Microsoft Power Platform

Copilot Studio in a Day

Speaker Name

Instructors & Leaders – Please Start Here

Please ensure you have reviewed the Train the Trainer deck for Copilot Studio in a Day. This contains how to run in a day and includes updates for the latest preview version of the material.

Additionally, ensure you have your environments set up for your students and you have reviewed the lab material before the event.

Included in this deck is the ‘Introduction to Conversational AI’ deck for the first hour of the event.

Please delete or hide this slide once you have completed this.

Agenda

Module	ID	Name	Length
Overview	1	What is Conversational AI? Introductory Presentation	30 minutes
Module 1: Access and Setup	2	Access your tenant and preview access	10 minutes
Module 2: Planning your Copilot	3	Plan your copilot using the planning template from the Bot Building Playbook	40 minutes
Module 3: Creating your Copilot	4	Create your first topic, test and publish your Copilot	40 minutes
Module 4: Authoring 101 in Unified Canvas	5	Author Copilots using the latest features in Copilot Studio	40 minutes
Module 5: Using Power Automate Connectors in Copilot Studio	6	Build Power Automate flows for your Copilot	40 minutes

Copilot Studio
Train the Trainer Presentation Deck

Introductions (Instructor)

Introductions (Participants)

- What's your name?
- Which company/group do you represent?
- Which city/country do you live in?
- What is your role?
- What are your expectations from this training?

CSIAD Agenda

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Microsoft Power Platform

Introduction to Conversational AI & Copilot Studio

Why Conversational AI

Growing number of communication channels

Need consistent messaging

Streamlined workforces

Higher workloads, capacity constraints,

Higher customer/ colleague demands

higher expectations, and

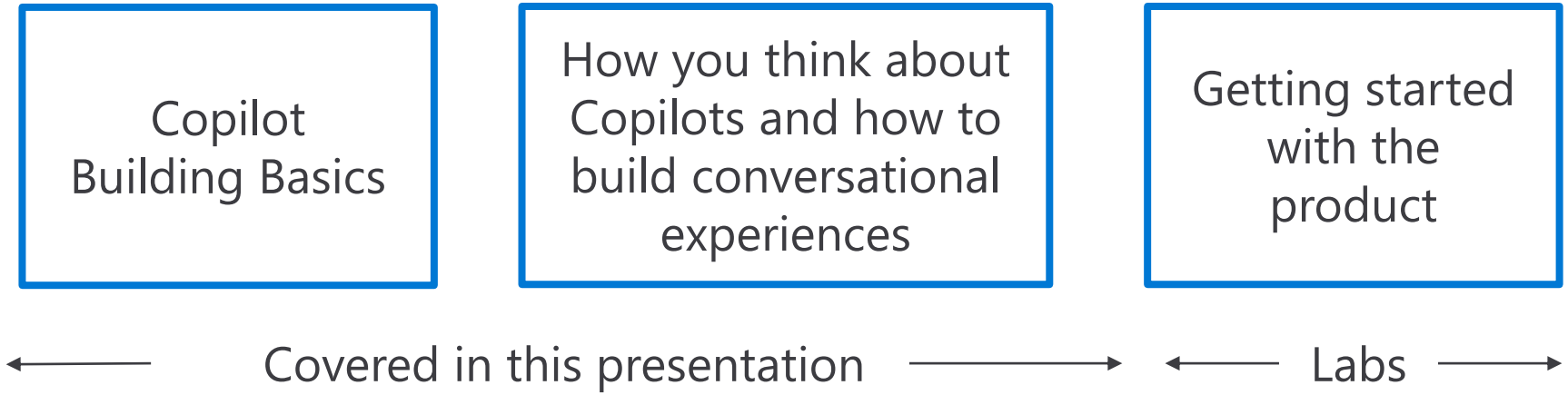
Achieve more with automation through conversation

Optimize digital workforce

Faster time to value

More time for innovation

This CSIAD is broken up into three sections



Microsoft

Copilot Studio

Your copilot, your way

Introduction to Conversational AI

{add your name and title here}

Agenda

Introduction to Conversational AI & Copilot Studio

Copilot Building Basics

How to think about Copilots

Building Conversational Experiences

Microsoft Copilot Studio

Microsoft

Introduction to Conversational AI & Microsoft Copilot Studio

Momentum of conversational AI

By 2026, **30% of work activities** involving the use of technology will be **conversationally enabled**[1]

By 2026, **conversational artificial intelligence** deployments within contact centers will **reduce agent labor costs by $80 billion**[2]

By 2026, **up to 80% of organizations'** digital experiences will be delivered to consumers **via virtual people**[2]

Source:
1. 2022 Gartner® - Forecast Analysis: Hyperautomation Enablement Software, Worldwide,
2. 2022 Gartner - Forecast Analysis: Hyperautomation Enablement Software, Worldwide

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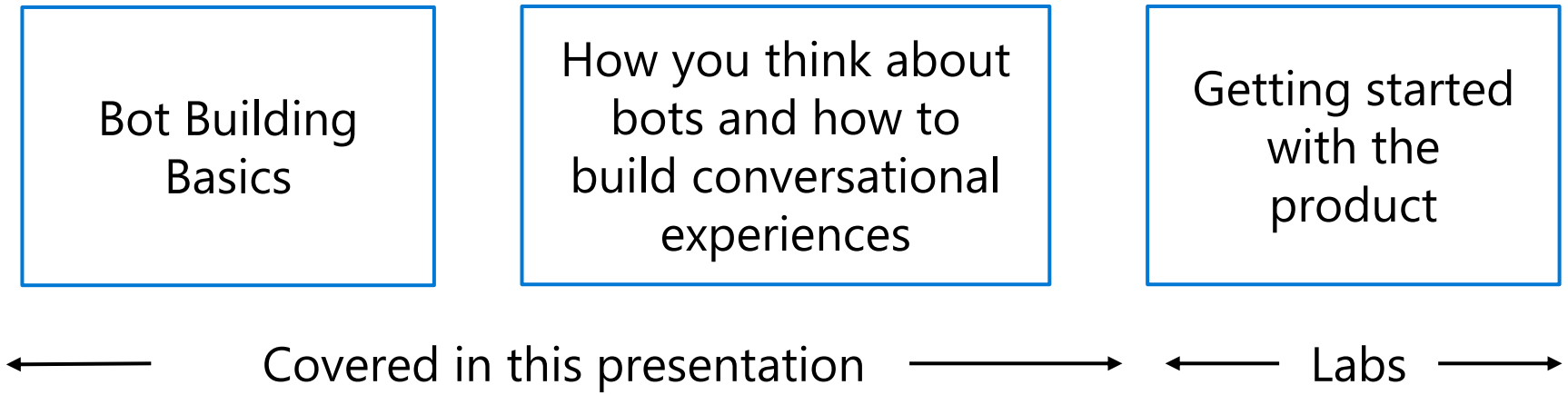
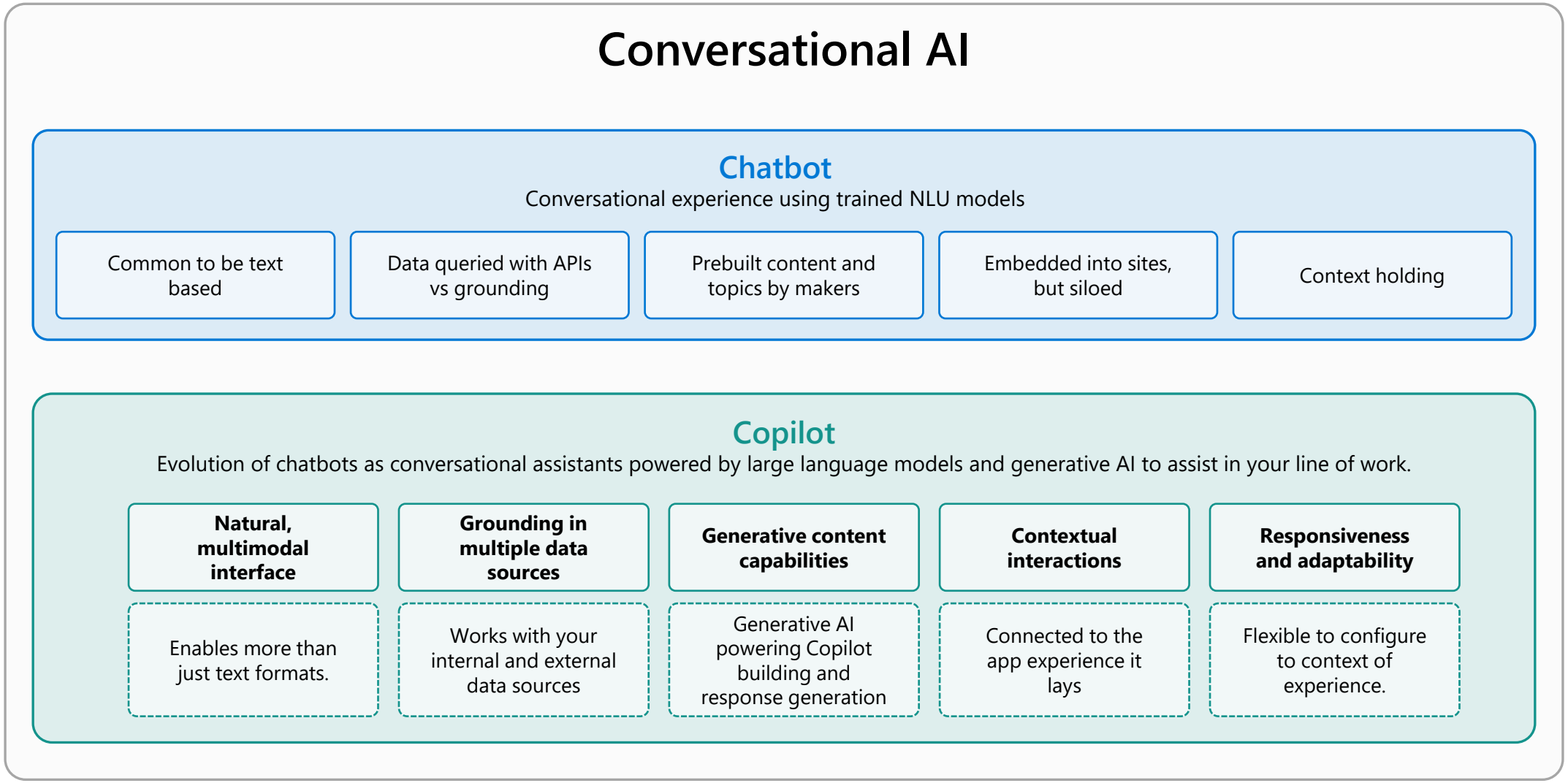
This CSiAD is broken up into three sections



Copilot Building Basics

Is a copilot just a chatbot?



A copilot for every Microsoft Cloud experience

Copilot for Dynamics 365

Copilot to assist roles within each line of business applications.

Copilot for Power Platform

Use natural language to accelerate the development of apps, automations and pages.

Copilot for Microsoft 365

Copilot assistant to accelerate productivity with Microsoft 365 apps and chat with your data

Copilot for Security

Receive tailored insights that empower your team to defend.

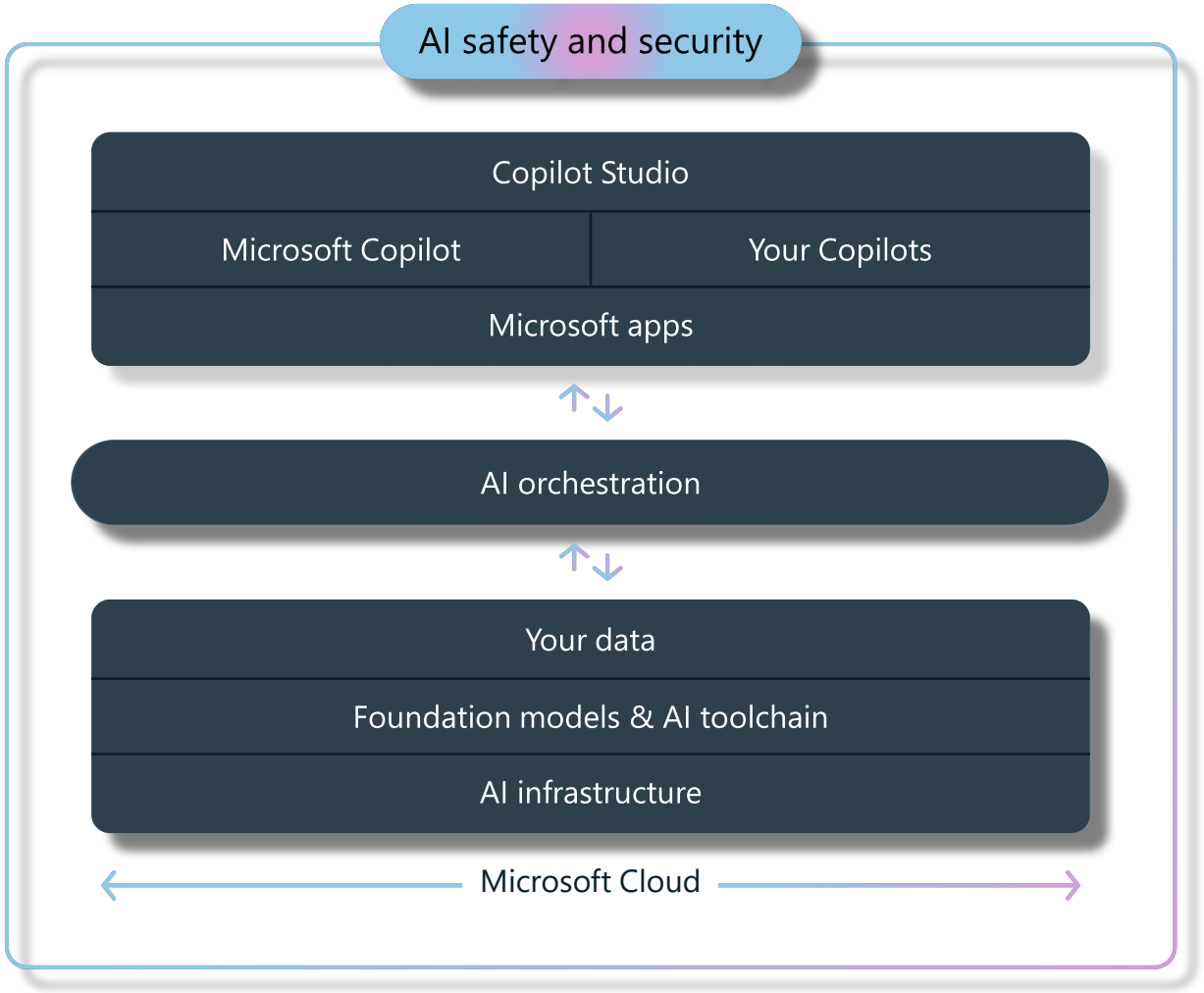
Copilot for Windows

Get answers and inspirations from across the web, supports creativity and collaboration, and helps you focus on the task

Copilot for GitHub

Increase developer productivity by helping you write code faster with less work.

Copilot stack



Microsoft Copilot Studio

Build your own copilot

Create and publish a custom copilot for your organization using the intuitive building experience enhanced with large language models and generative AI

Customize Microsoft Copilot

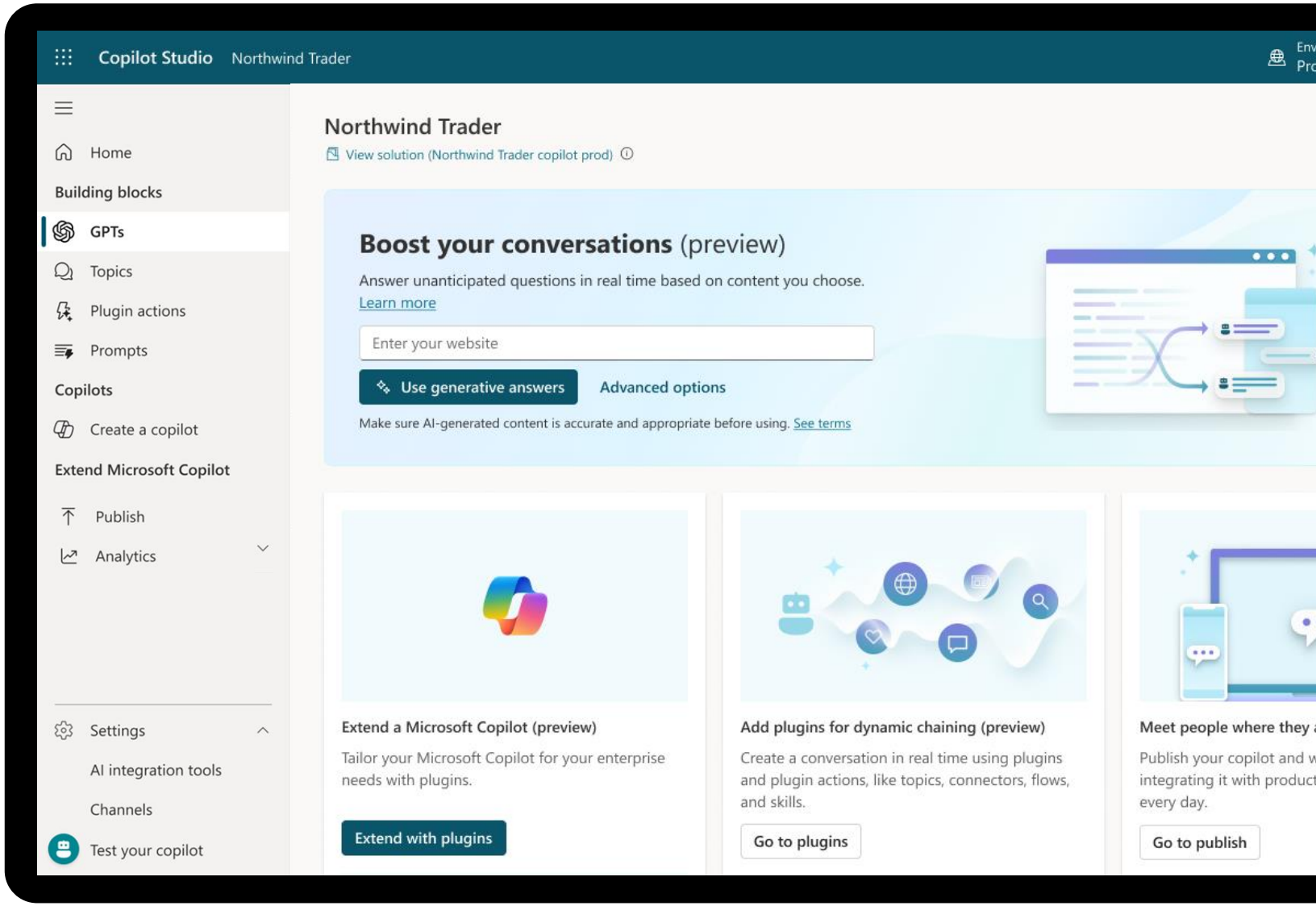
Extend and customize 1st party Microsoft Copilots with your own enterprise scenarios. Copilot Studio will be included with the Microsoft 365 Copilot SKU.

Connected platform

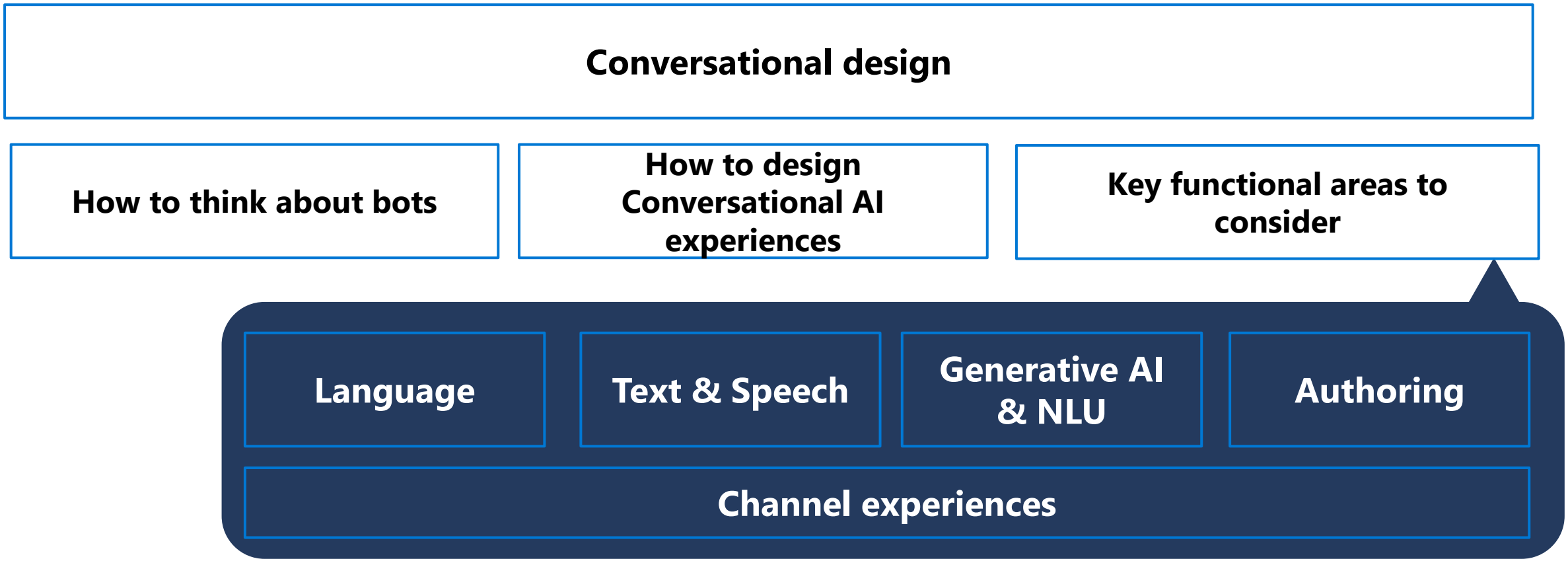
Integrates and exposes various Microsoft's conversational AI technology stacks - integrated with Azure AI Studio, Azure Cognitive Services, Azure Bot Framework, Power Platforms AI models and more

Manage copilot experiences

Governance and control features to monitor usage with full visibility of customizations, standalone copilots as well as who is building and customizing them.

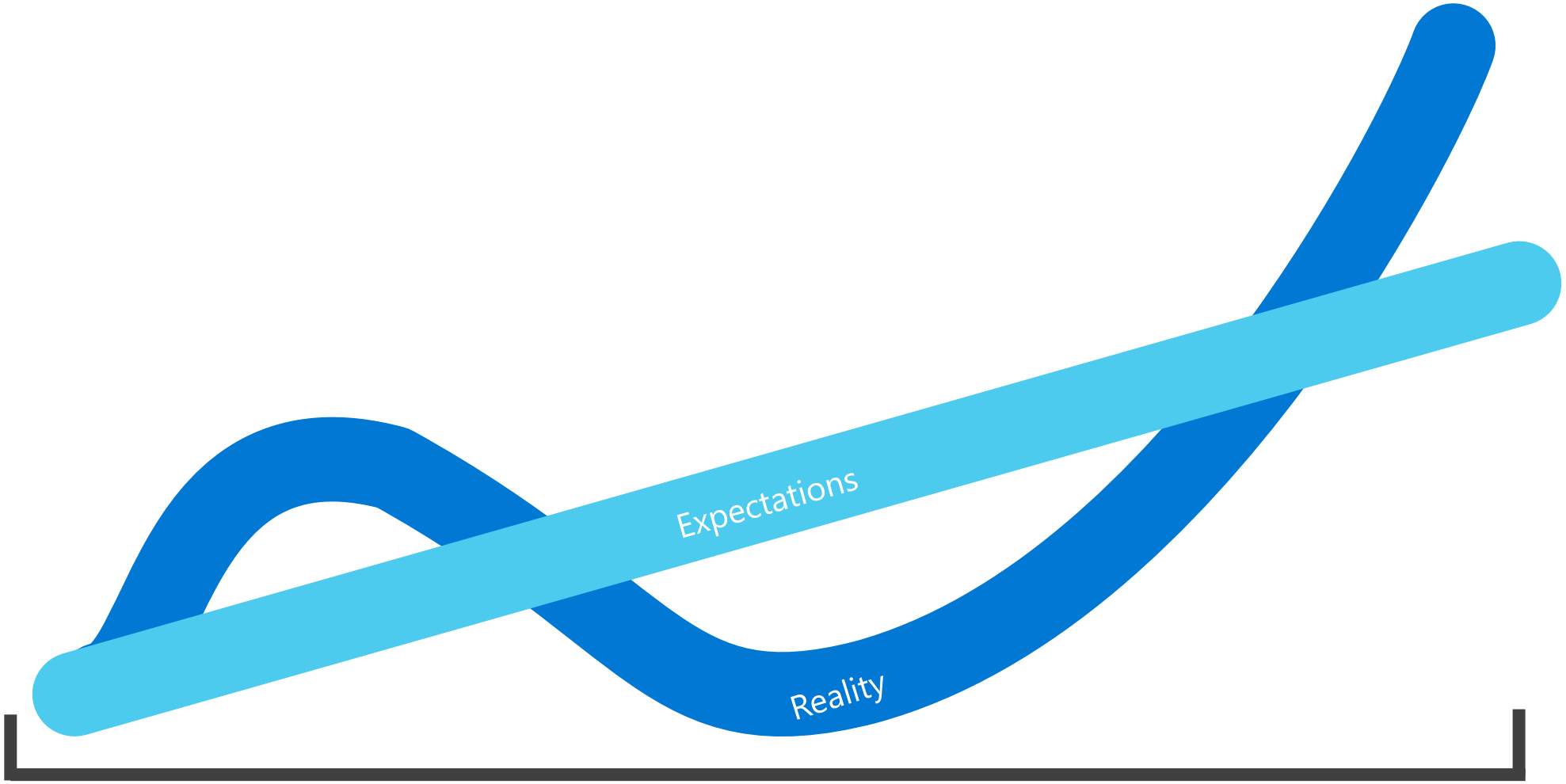


Building Conversational Experiences can be broken up like this….

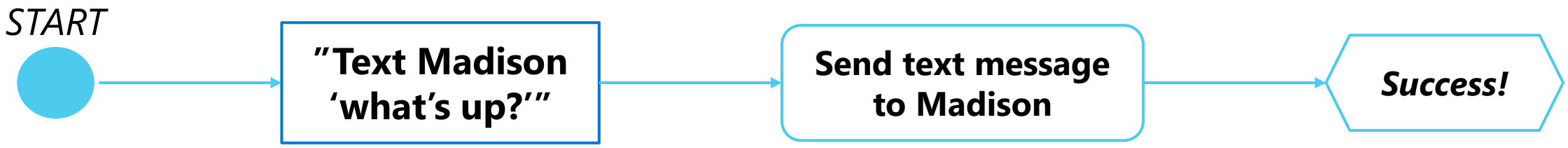


How to think about Copilots

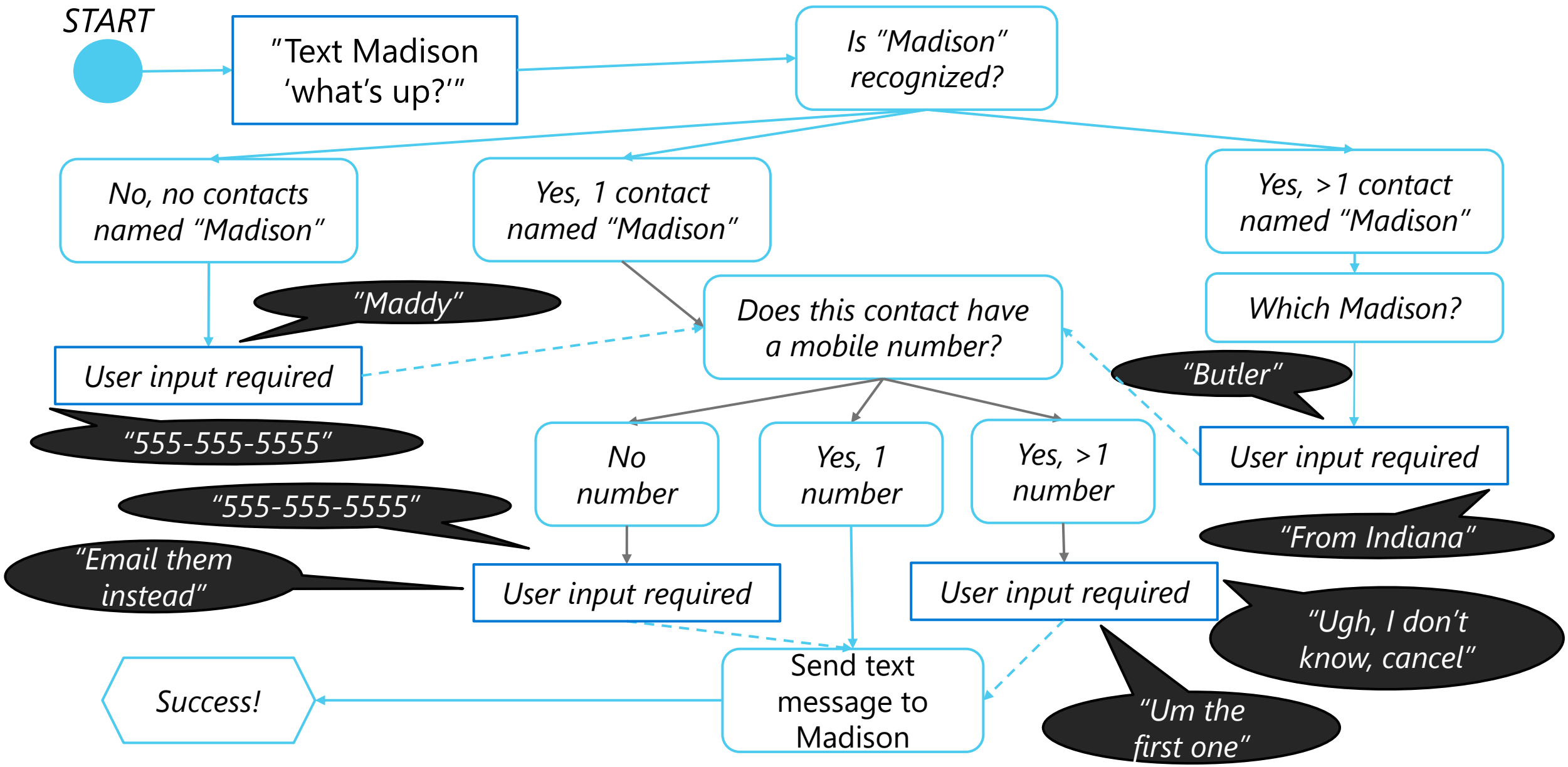
Copilot rollout



It’s easy to know where a conversation begins and ends…

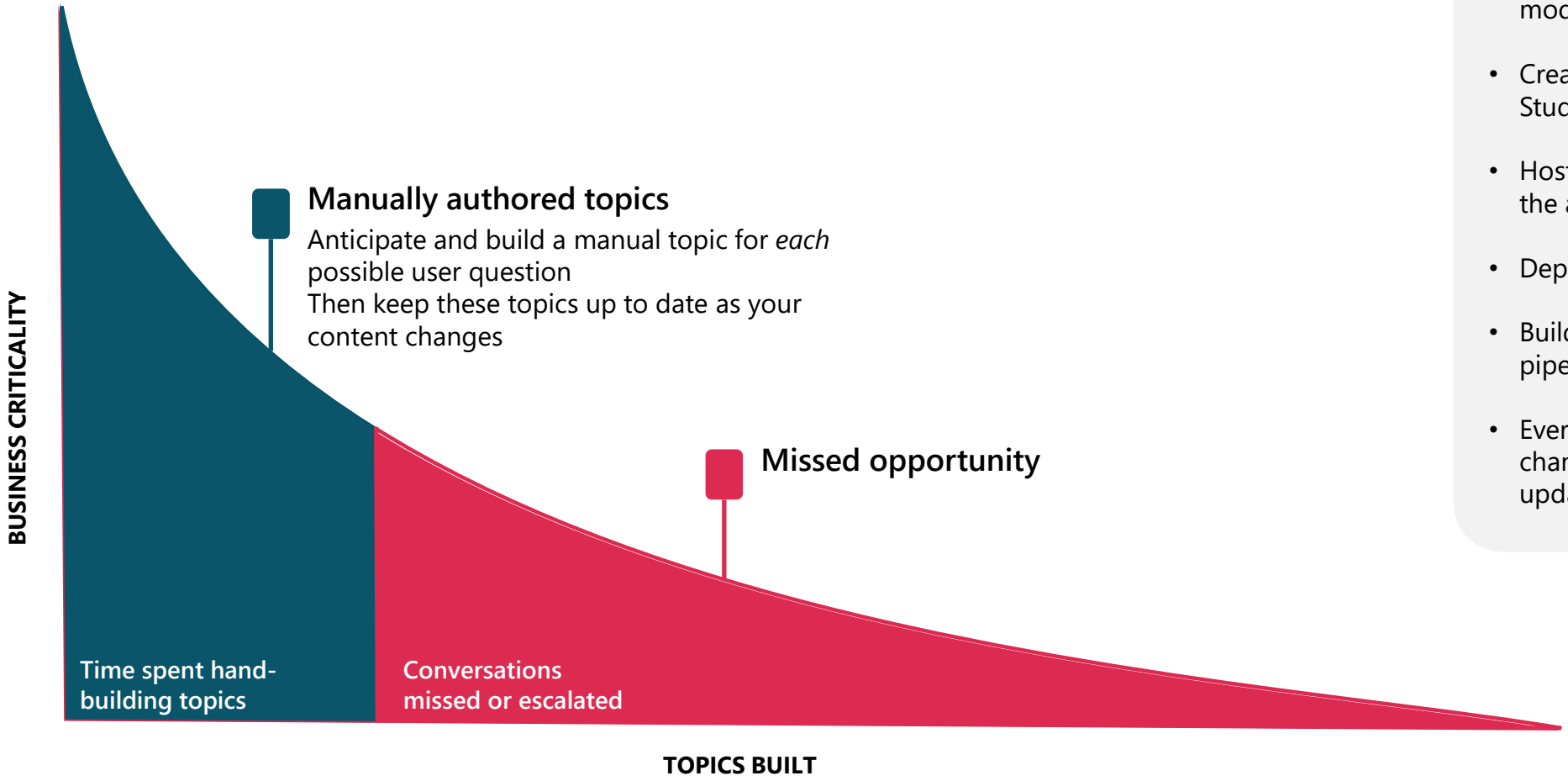


The middle is the hard part…



Adding Generative AI

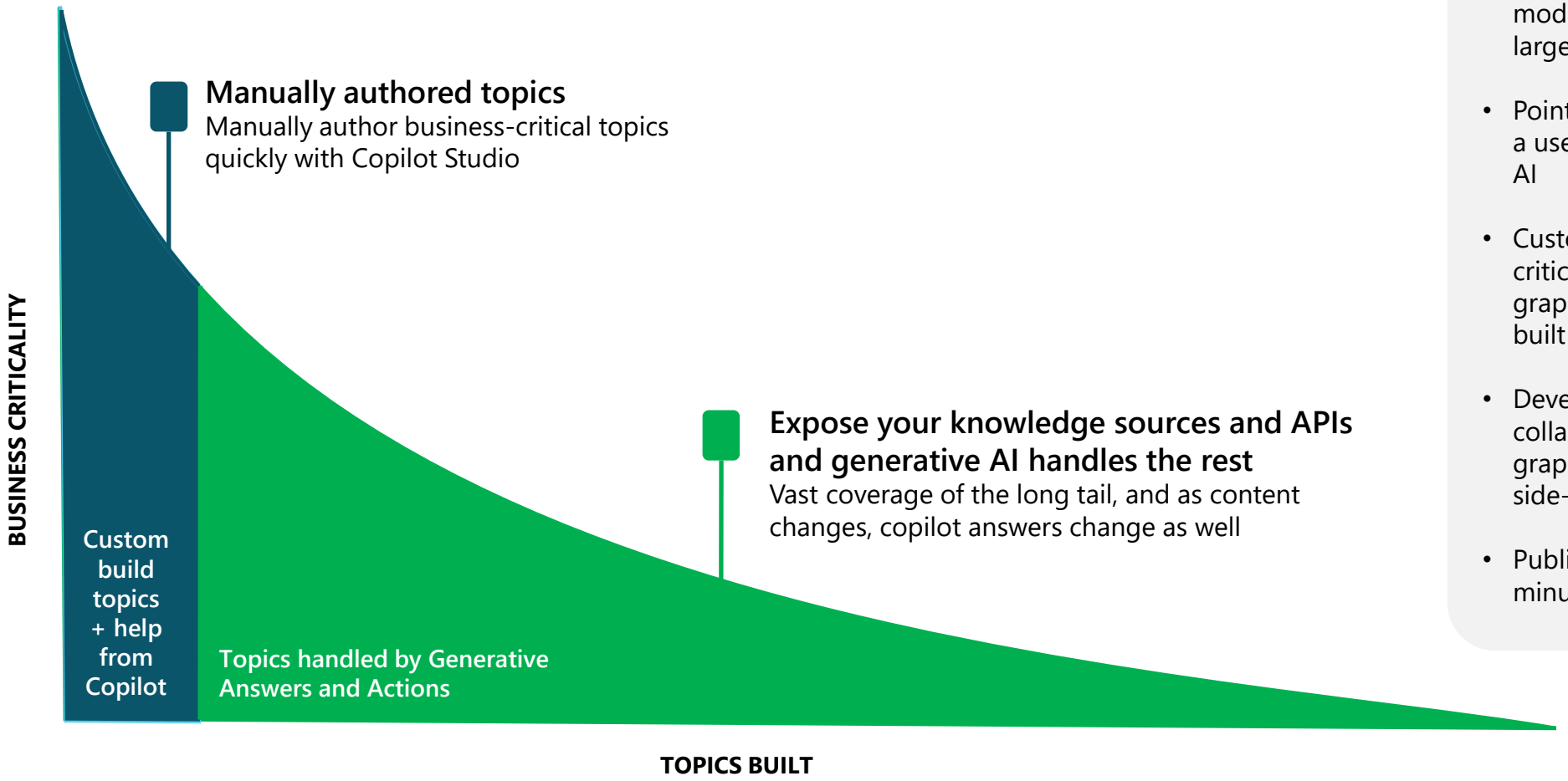
Generative AI is changing building



Traditional (e.g. Azure)

- Create Azure tenant and infra
- Annotate thousands of utterances and conversations to build a custom NL model
- Create topics in code using Visual Studio and BF SDK
- Host Azure Bot Service and instantiate the appropriate channel
- Deploy your copilot to the service
- Build your own custom analytics pipeline
- Every time your knowledge content changes (e.g. different hours) go and update the copilot in code

Generative AI is changing building



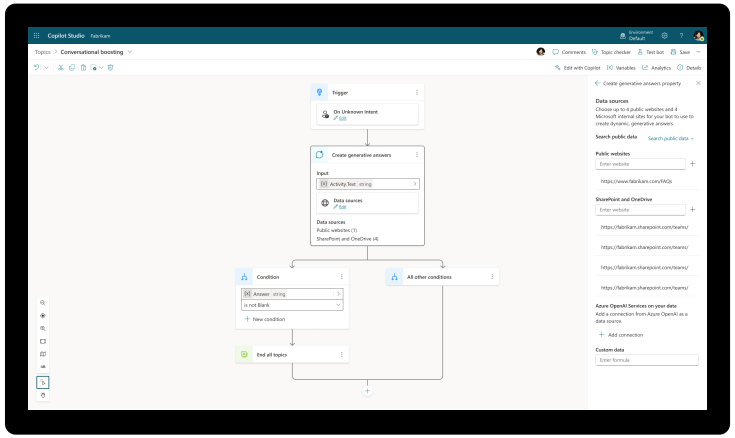
Copilot Studio with Generative AI

- Full E2E SaaS – no infra to host or manage
- No explicit NL training or custom model required, comes with powerful large language model
- Point to a knowledge sources and have a useful bot in minutes with Generative AI
- Customize your copilot with business-critical topics using easy to use graphical interface and 1000s of pre-built connectors, or call custom APIs
- Developers, low-code users can collaborate inside the same canvas with graphical multi-authoring and code side-by-side
- Publish to the channel of your choice in minutes with a few clicks

Generative AI in Copilot Studio

Powered by Azure OpenAI Service

TO ANSWER

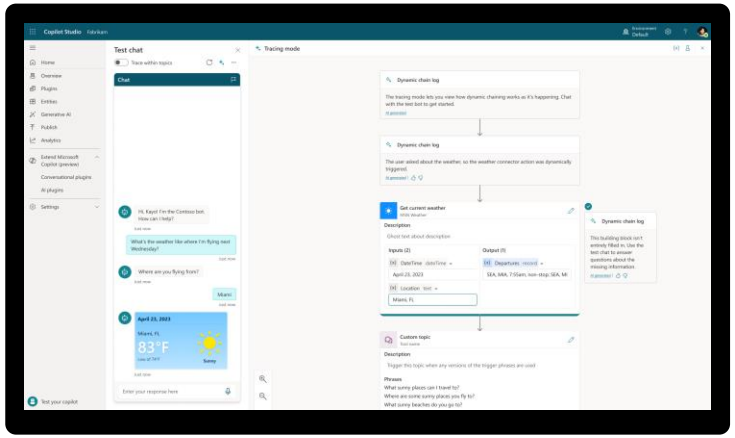


Generative Answers

Dynamically generate multi-turn answers based off an organization's content in real-time.

Public Preview

TO ACT

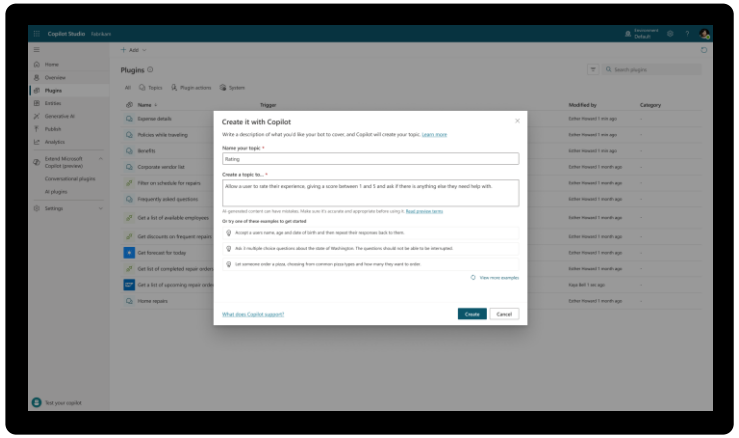


Generative Actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.

Public Preview

TO BUILD



Generative Building

The Copilot assistant helps build, design and modify copilot topics through natural language.

Generally Available

Generative Answers

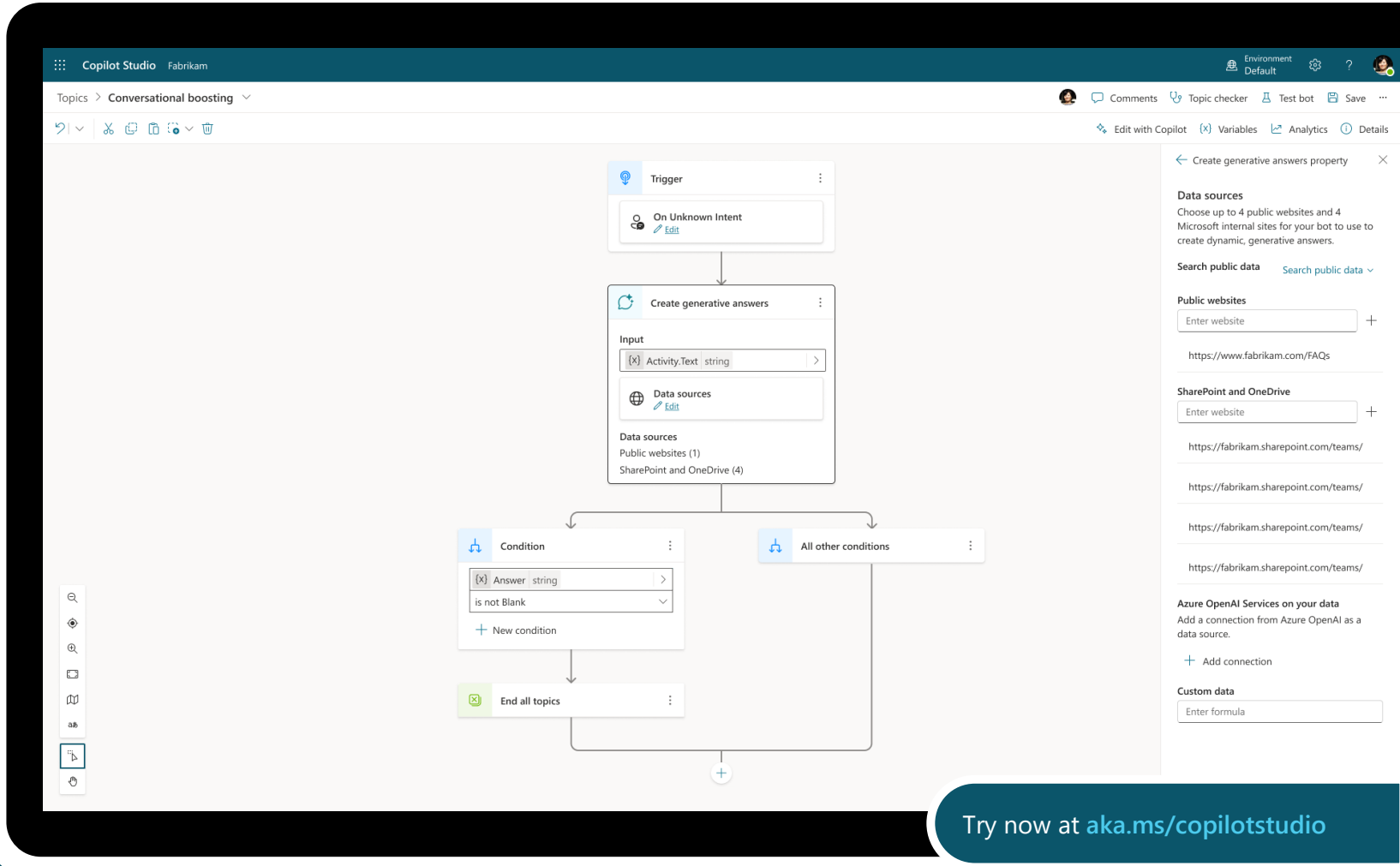
Out of the box, your copilot answers questions based on the content your organization has already invested in

Always up to date, your copilot uses your latest published content for each request; no more maintaining info in two places

Enable multi-turn chat over your own internal and external knowledge sources, files and sites with generative answers

Supports content on the **web**, **SharePoint**, **Azure Open AI** on your data, and **direct file upload** and custom calls to backends

You can even pull data **from an API or other backend system** and enable generative chat over it



Try now at aka.ms/copilotstudio

Generally Available

Considerations & Discovery with Generative AI

Copilot Studio / Azure OpenAI Service on Your Data / Azure OpenAI Service Comparison

	Data Store	Data Access	Data Security	Prompt Control	Responsible AI	Client Access	Analytics and Monitoring
Copilot Studio (Generative Answers)	• Public Websites • SharePoint • Imported Files • Dataverse • 3P APIs	Automatic with nothing to host or manage	• On-behalf-of users • API Key	• No need to write your own prompts • Response tone • Output formatting • Custom prompts at node	• Cognitive Services Moderation • Provenance Validation • Azure OpenAI Service Content Moderation	• Web • Teams • Facebook • Slack • Bot Framework Channels • APIs	• Built-in analytics • Self-hosted Azure Application Insights connectivity with custom events
Azure OpenAI Service - On Your Data	• Configured pipelines to import files • Custom Azure Cognitive Search Index	Automatic through self-hosted data stores and indexes	Any through custom data security	• No need to write your own prompts • Response tone • Output formatting	• Grounded to your data • Azure OpenAI Service Moderation	• APIs • Self-managed Web App • Power Virtual Agents	Any through custom developed analytics
Azure OpenAI Service	Any	Manual through custom data access	Any through custom data security	Requires custom prompt authoring	Azure OpenAI Service Moderation	APIs	Any through custom developed analytics

Questions to help you get started

- What does it mean for your bot to truly answer their questions?
- What are some unexpected responses your bot may encounter?
- What data might you need access to and need to integrate with various systems to do so?
- What assumptions do your users have when they engage with your bot?
- What context do your users have when talking with your bot, and does this solution fit that mental model?
- How can you design a bot that is easy for your users to navigate and find the answers they are looking for?

Building Conversational Experiences

Who is a “user”?

User

A person who uses a product or service.

Things to keep in mind

- Who is your user?
- What types of conversations will your bot be having with this audience?
- And lastly where will these conversations take place?
- Don’t forget who you’re designing for

Users talking to bots

They know they’re not talking to a person.

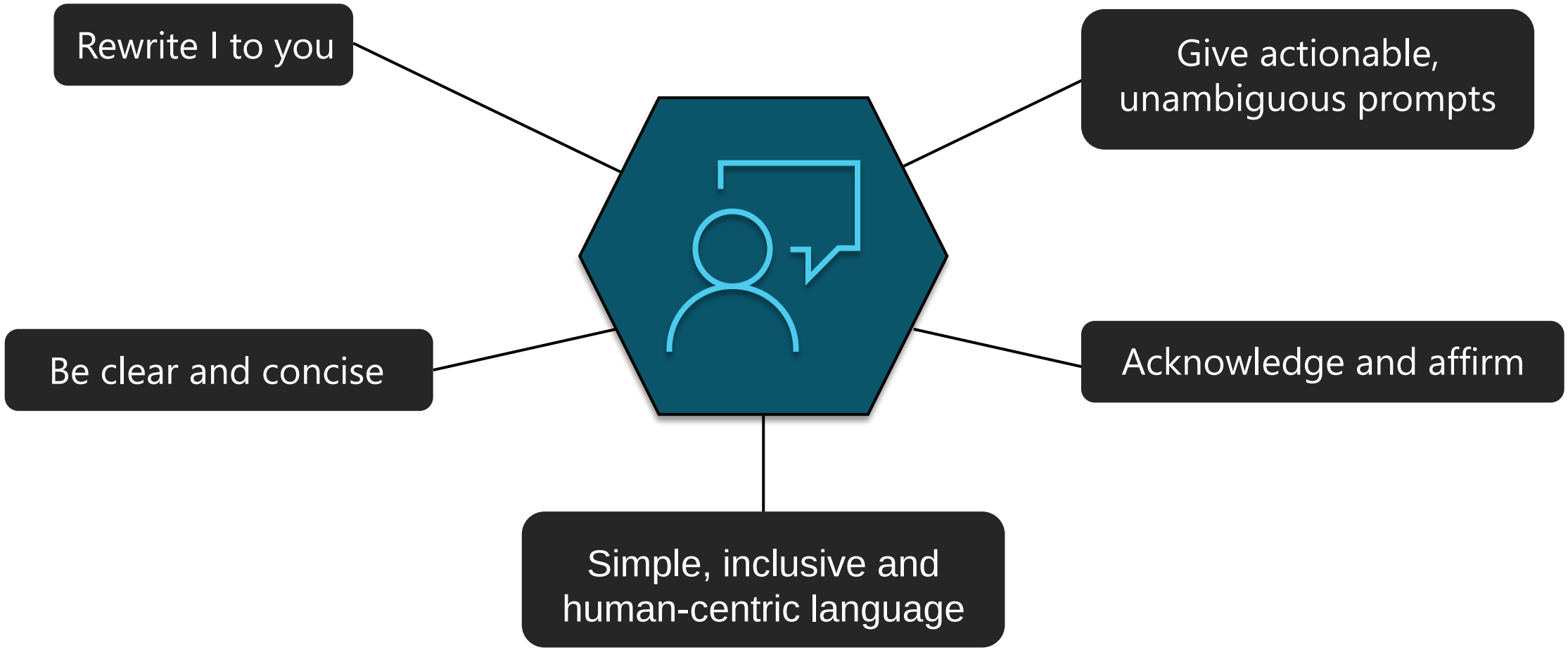
They know it’s not reciprocal.

But their emotional response is very real.

Useful Conversational Experiences

- Pick a scenario that will delight and will be requested repeatedly: is the scenario conversational?
- Does the bot easily solve the user's problem with minimal back and forth turns?
- Is the bot discoverable and easy to invoke?
- Mimic human to human conversation in your design of the transcript
- Prototype to uncover what is working
- Create a test plan

Focus on user-centric language



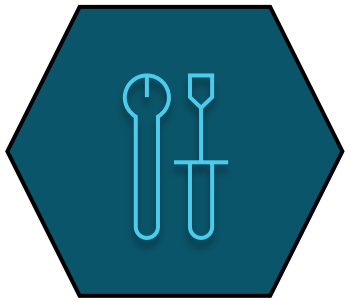
Best practices

Understand your user

Keep it simple and clear

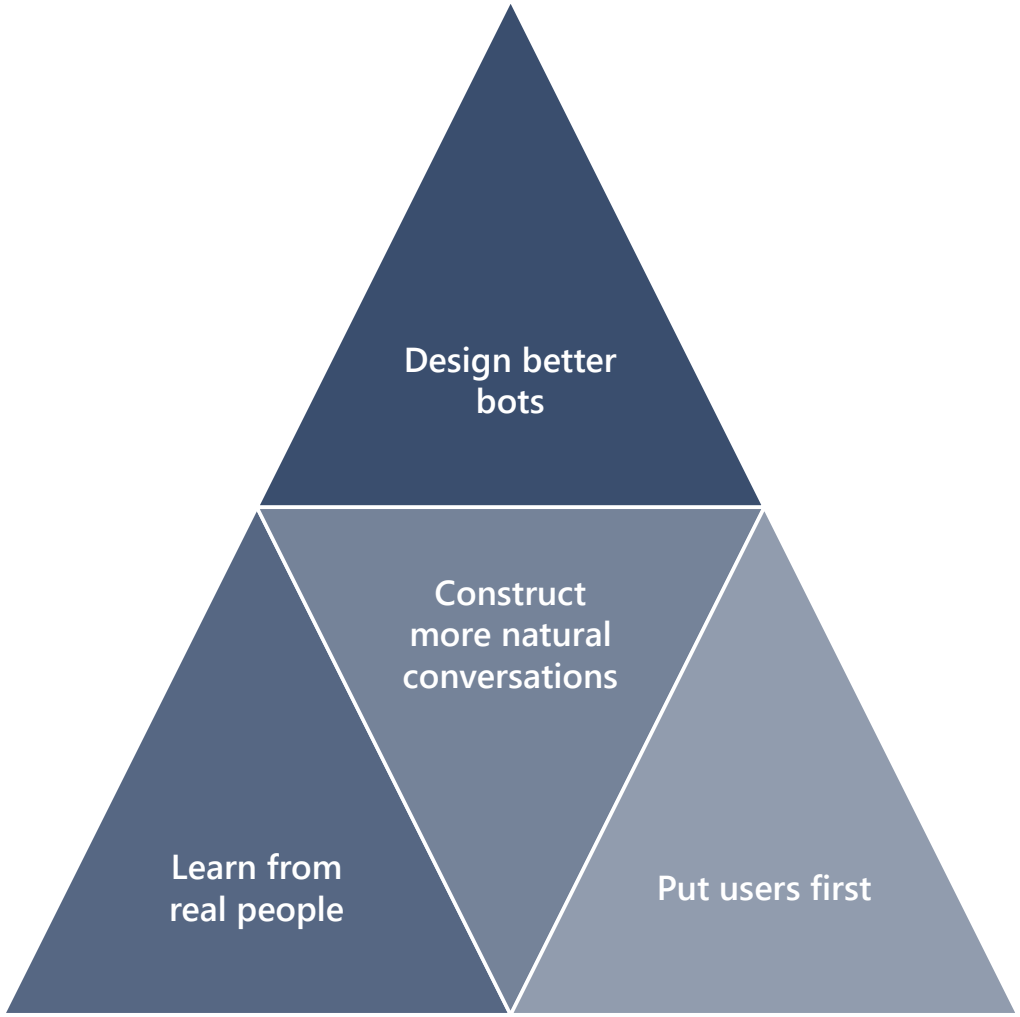
Be inclusive

Personality is important



Use the right tools

Essence of inclusive design



Bot brand & personality

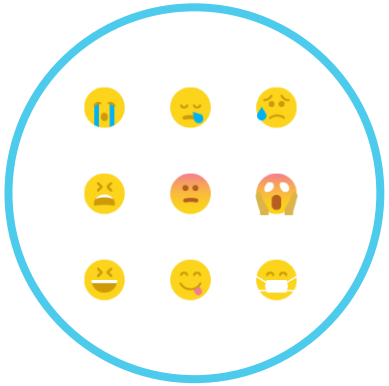
What's my name?

Think about your name and how it reflects your brand and the type of bot you are designing.

How do I look and react?

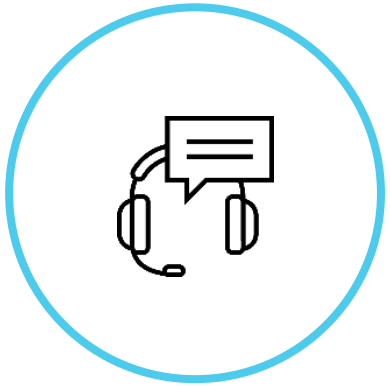
Just like a mobile app your assistant icon is really important.

The interactive changing state of your bot is highly recommended: listening, waiting, responding etc.



How should I sound?

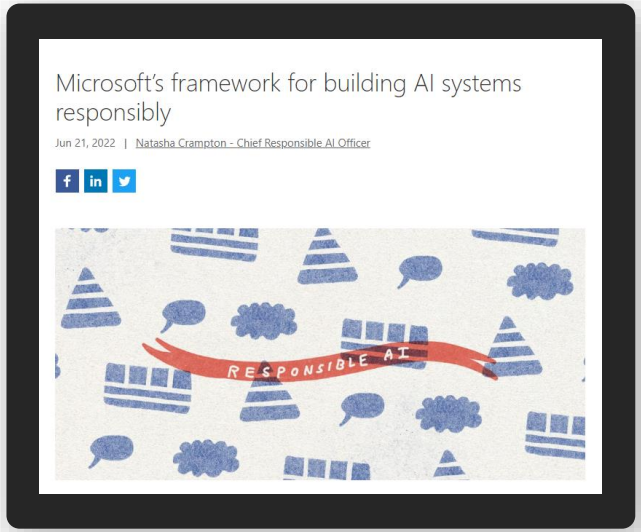
Tone of voice is the primary way you will inject your brand into a bot.



When should I ask for help?

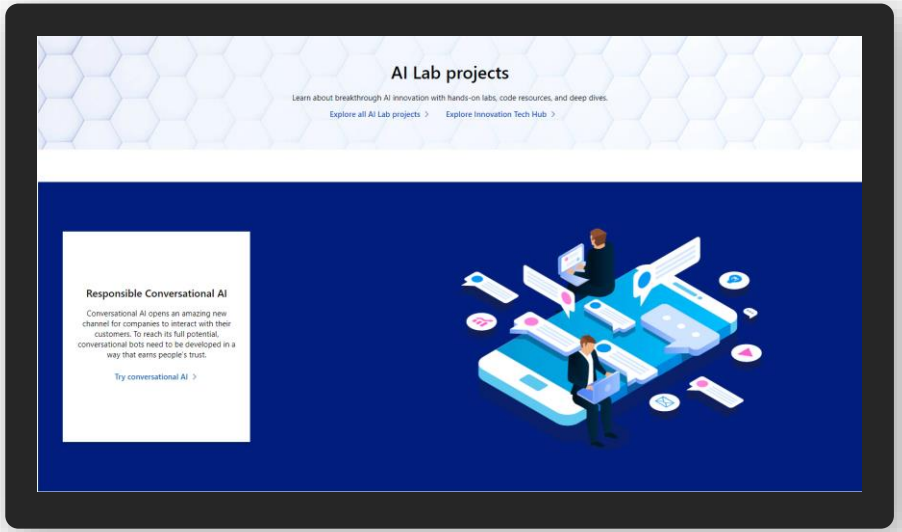
No matter how smart your bot is, there will be cases where you still need to let a human take control of the conversation.

Ethical considerations



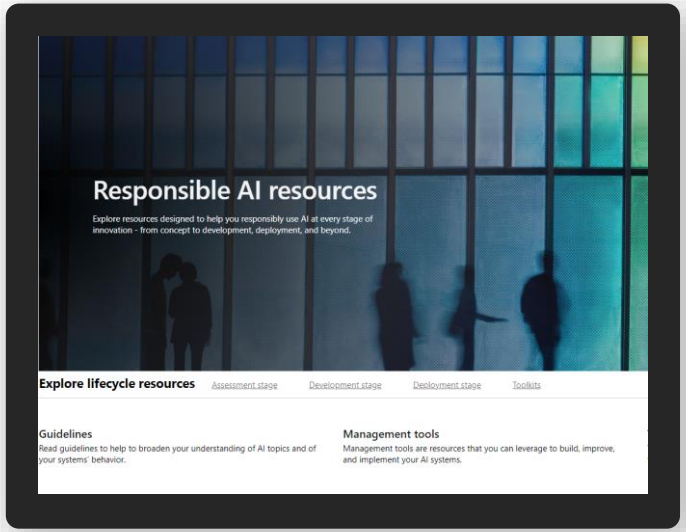
Microsoft's framework for building AI systems responsibly

aka.ms/MSFTAIFramework



Responsible Conversational AI – Microsoft AI Lab

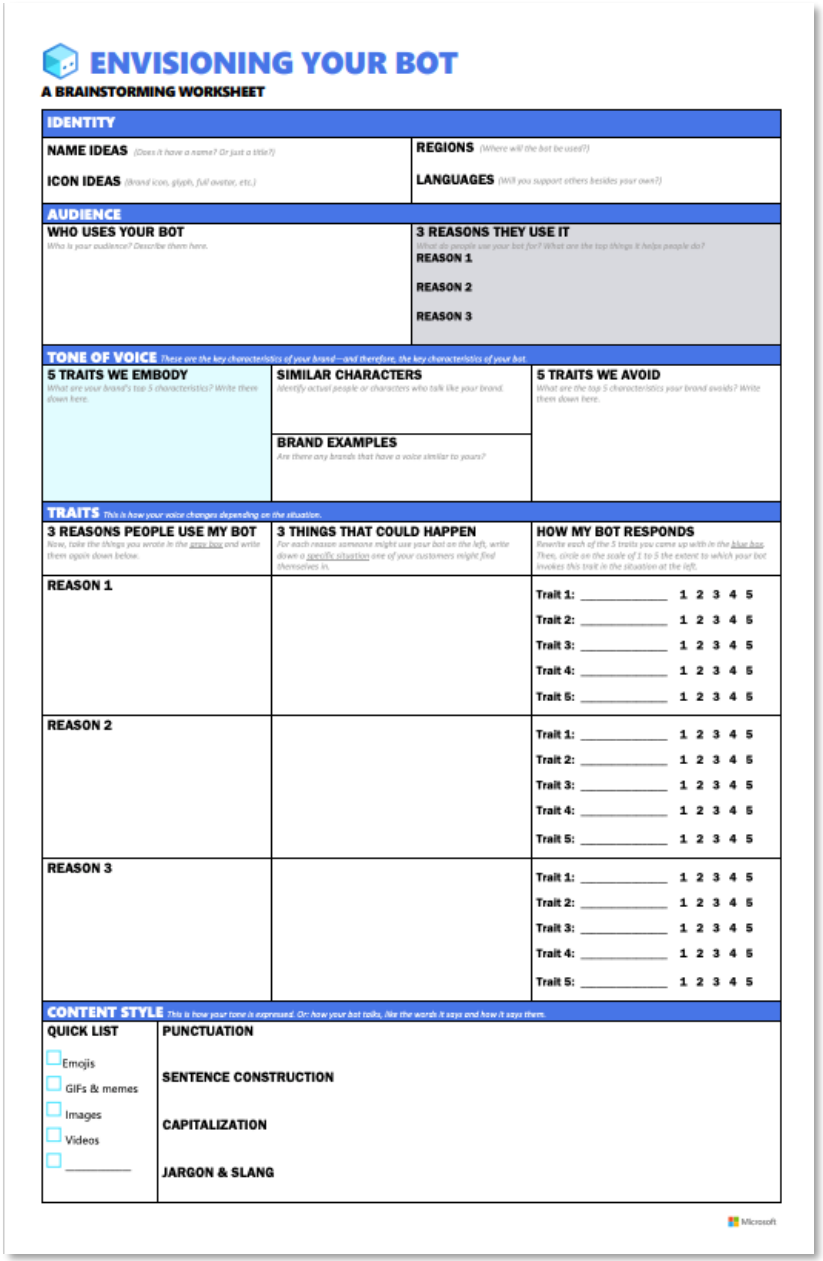
aka.ms/ResponsibleConvAI



Responsible AI Resources – Microsoft AI

aka.ms/Responsible-AI-Resources

Brainstorm worksheet



ENVISIONING YOUR BOT

A BRAINSTORMING WORKSHEET

IDENTITY

NAME IDEAS *(Does it have a name? Or just a title?)* **ICON IDEAS** *(Brand icon, glyph, full avatar, etc.)*	**REGIONS** *(Where will the bot be used?)* **LANGUAGES** *(Will you support others besides your own?)*

AUDIENCE

WHO USES YOUR BOT *Who is your audience? Describe them here.*	**3 REASONS THEY USE IT** *What do people use your bot for? What are the top things it helps people do?* **REASON 1** **REASON 2** **REASON 3**

TONE OF VOICE *These are the key characteristics of your brand—and therefore, the key characteristics of your bot.*

5 TRAITS WE EMBODY *What are your brand's top 5 characteristics? Write them down here.*	**SIMILAR CHARACTERS** *Identify actual people or characters who talk like your brand.* **BRAND EXAMPLES** *Are there any brands that have a voice similar to yours?*	**5 TRAITS WE AVOID** *What are the top 5 characteristics your brand avoids? Write them down here.*

TRAITS *This is how your voice changes depending on the situation.*

3 REASONS PEOPLE USE MY BOT *Now, take the things you wrote in the green box and write them again down below.*	**3 THINGS THAT COULD HAPPEN** *For each reason someone might use your bot on the left, write down a specific situation one of your customers might find themselves in.*	**HOW MY BOT RESPONDS** *Rewrite each of the 5 traits you came up with in the blue box. Then, circle on the scale of 1 to 5 the extent to which your bot invokes this trait in the situation at the left.*
REASON 1		**Trait 1:** _____ 1 2 3 4 5 **Trait 2:** _____ 1 2 3 4 5 **Trait 3:** _____ 1 2 3 4 5 **Trait 4:** _____ 1 2 3 4 5 **Trait 5:** _____ 1 2 3 4 5
REASON 2		**Trait 1:** _____ 1 2 3 4 5 **Trait 2:** _____ 1 2 3 4 5 **Trait 3:** _____ 1 2 3 4 5 **Trait 4:** _____ 1 2 3 4 5 **Trait 5:** _____ 1 2 3 4 5
REASON 3		**Trait 1:** _____ 1 2 3 4 5 **Trait 2:** _____ 1 2 3 4 5 **Trait 3:** _____ 1 2 3 4 5 **Trait 4:** _____ 1 2 3 4 5 **Trait 5:** _____ 1 2 3 4 5

CONTENT STYLE *This is how your tone is expressed. Or: how your bot talks, like the words it says and how it says them.*

QUICK LIST	
☐ Emojis ☐ GIFs & memes ☐ Images ☐ Videos ☐ _____	**PUNCTUATION** **SENTENCE CONSTRUCTION** **CAPITALIZATION** **JARGON & SLANG**

Microsoft

https://aka.ms/ConversationalAIWorksheet

[Conversational user experience in the Bot Framework SDK - Bot Service | Microsoft Docs]

Align the bot with your organization's goals

- Handling repetitive information requests when a skilled human agent is not required
- Reducing the time, it takes to get answers to end users
- Lowering support call volume, while also handling high call volume
- Improving support KPIs
- Using a bot as part of the brand strategy

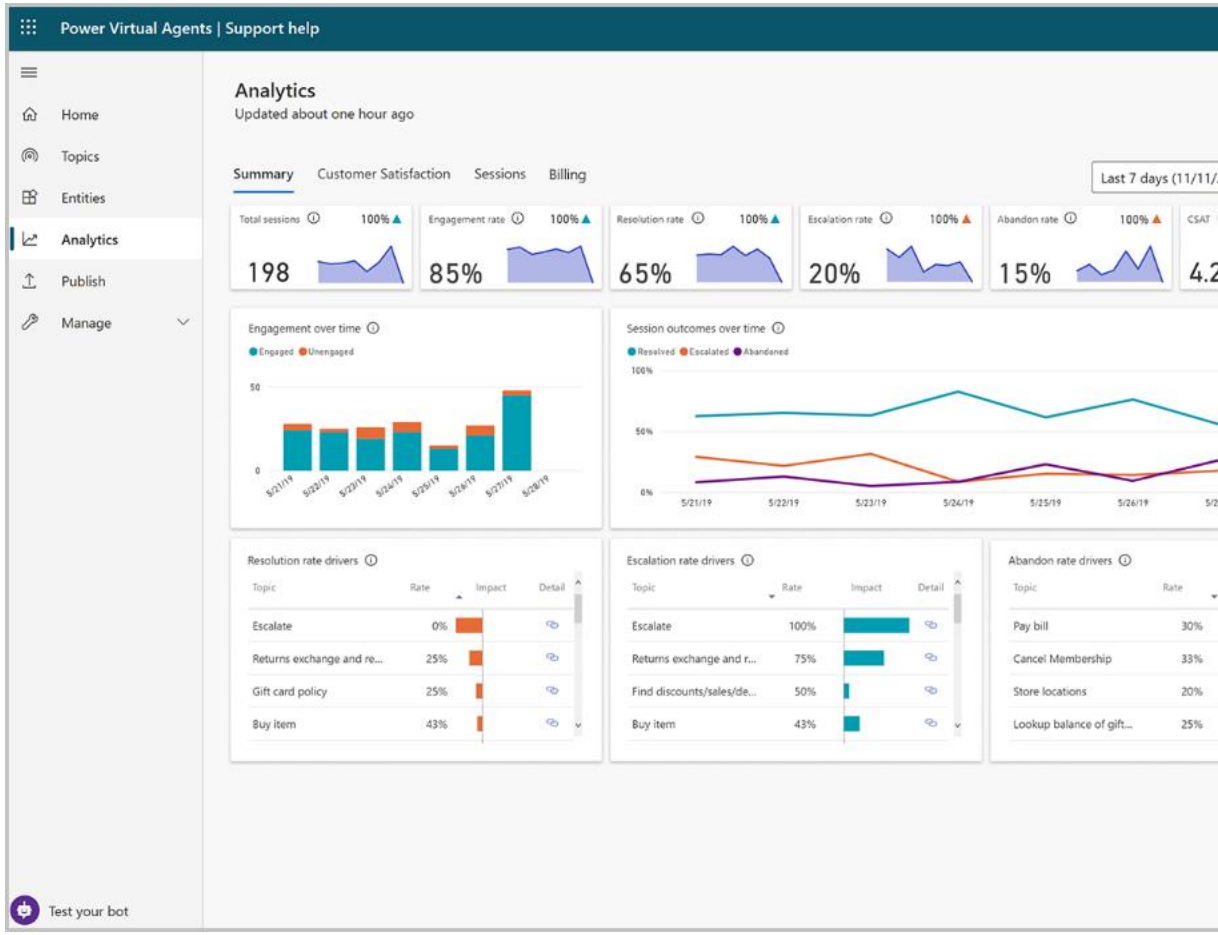
Getting Started Right

- Identify the right requirements
- Start small and scale up

- Track Analytics for ongoing improvements

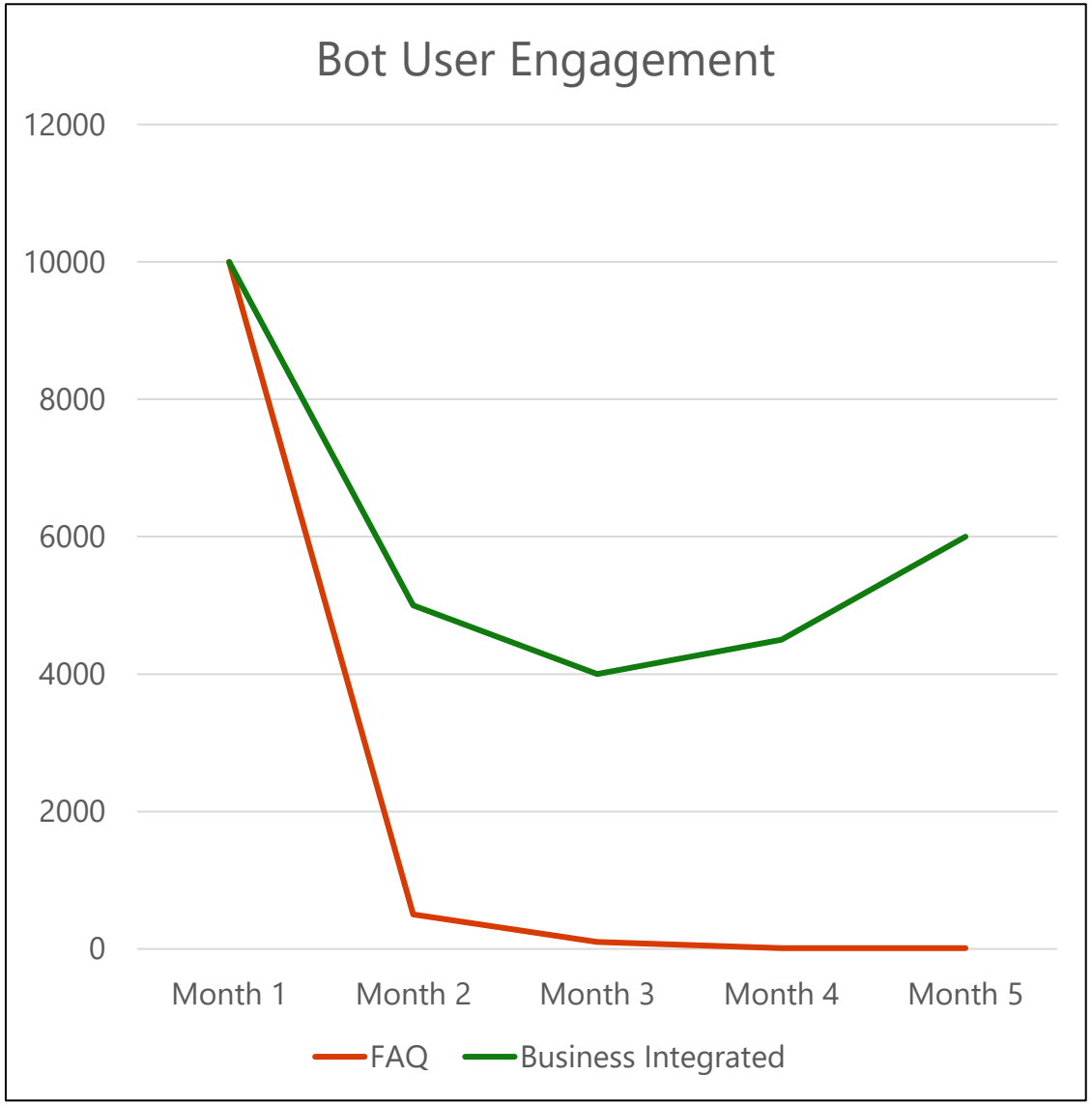
- Utilize the Copilot Studio implementation guide:

https://aka.ms/copilotimplemetationguide



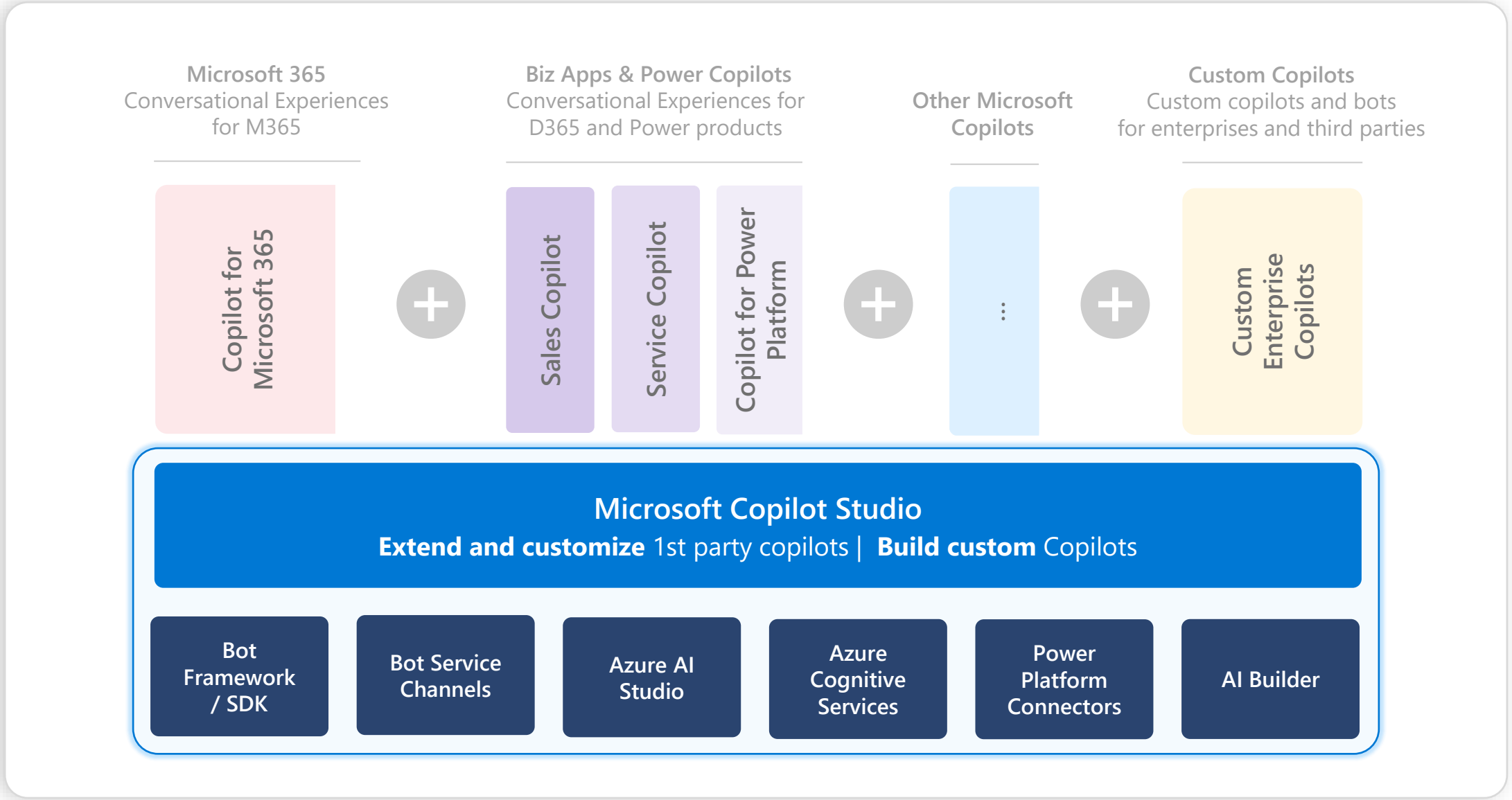
Build Engaging Bots

- FAQ vs Business Integrated
- Leverage Power Automate Connectors
- Value beyond Form Filling
- High Deflection Rate

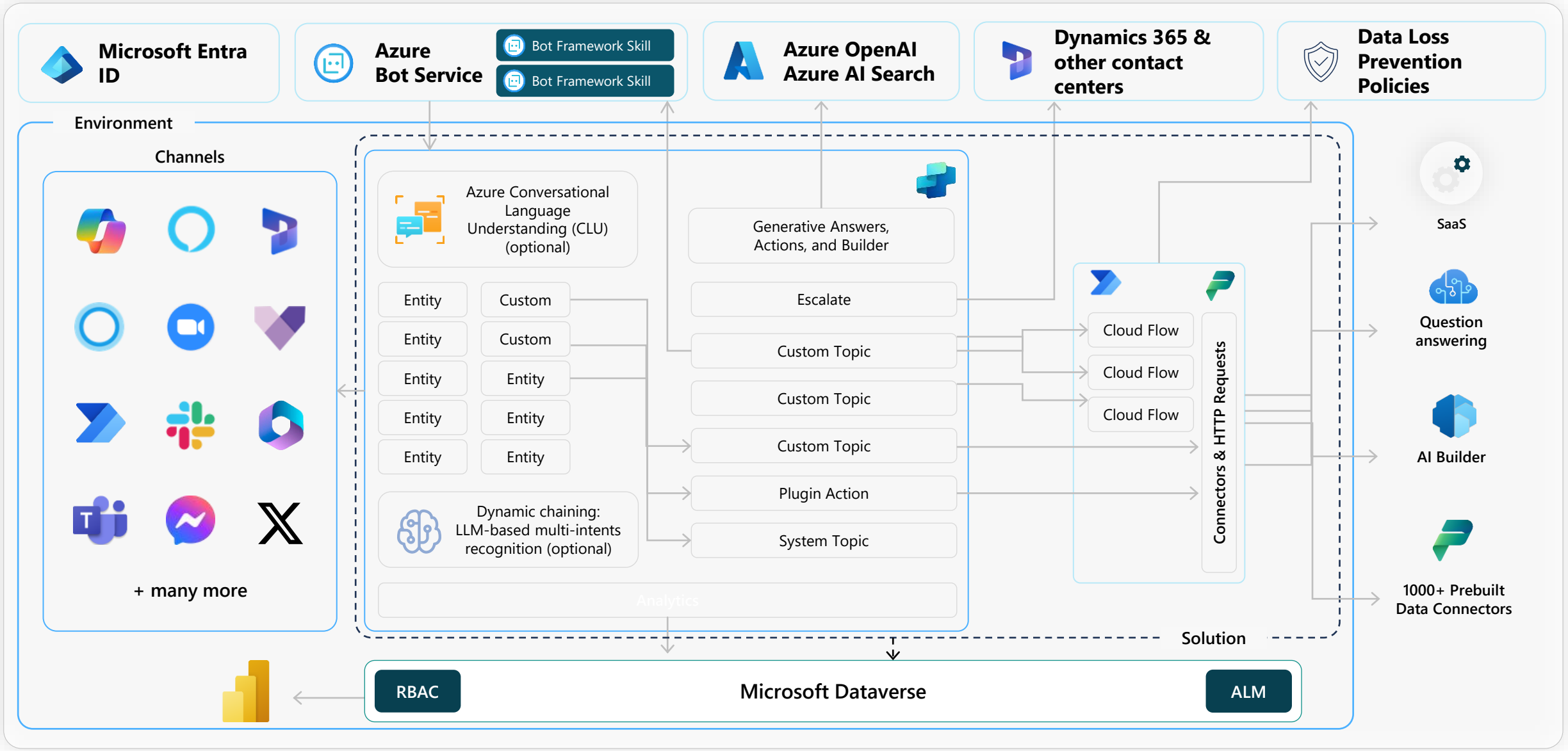


Microsoft Copilot Studio

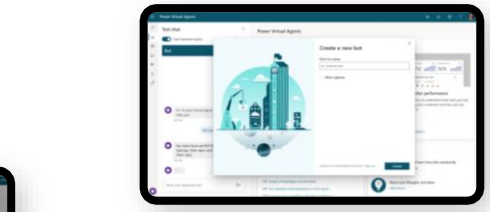
Copilots and Conversational AI



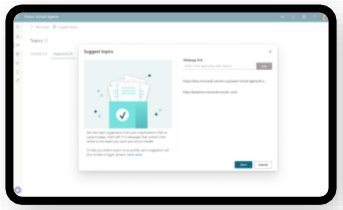
Copilot Studio Architecture



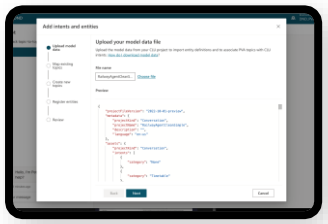
Create copilot with E2E SaaS and single pane of glass



Chat over knowledge with Generative AI
Use generative answers and custom GPTs to provide enterprise specific answers over your files, websites, and internal shares

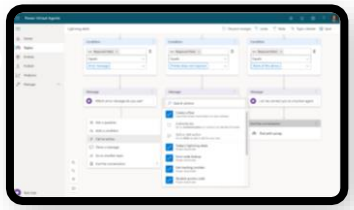


Conversational Services
Integrate with Azure AI Studio, Azure Cognitive Services, Bot Framework and more

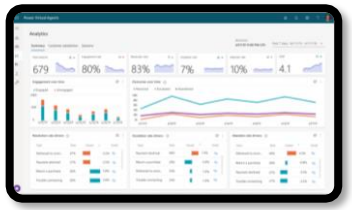


Copilot Studio
Build your own copilots

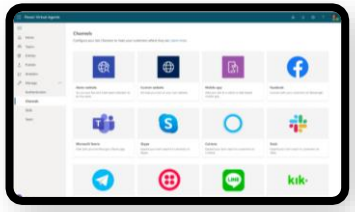
Create specific topics
Supplement generative answers with specific, curated topics. Build them easily with the powerful graphical studio



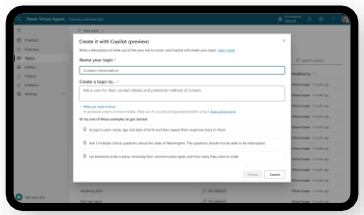
Monitor and Improve with Rich out-of-the-box telemetry and analytics



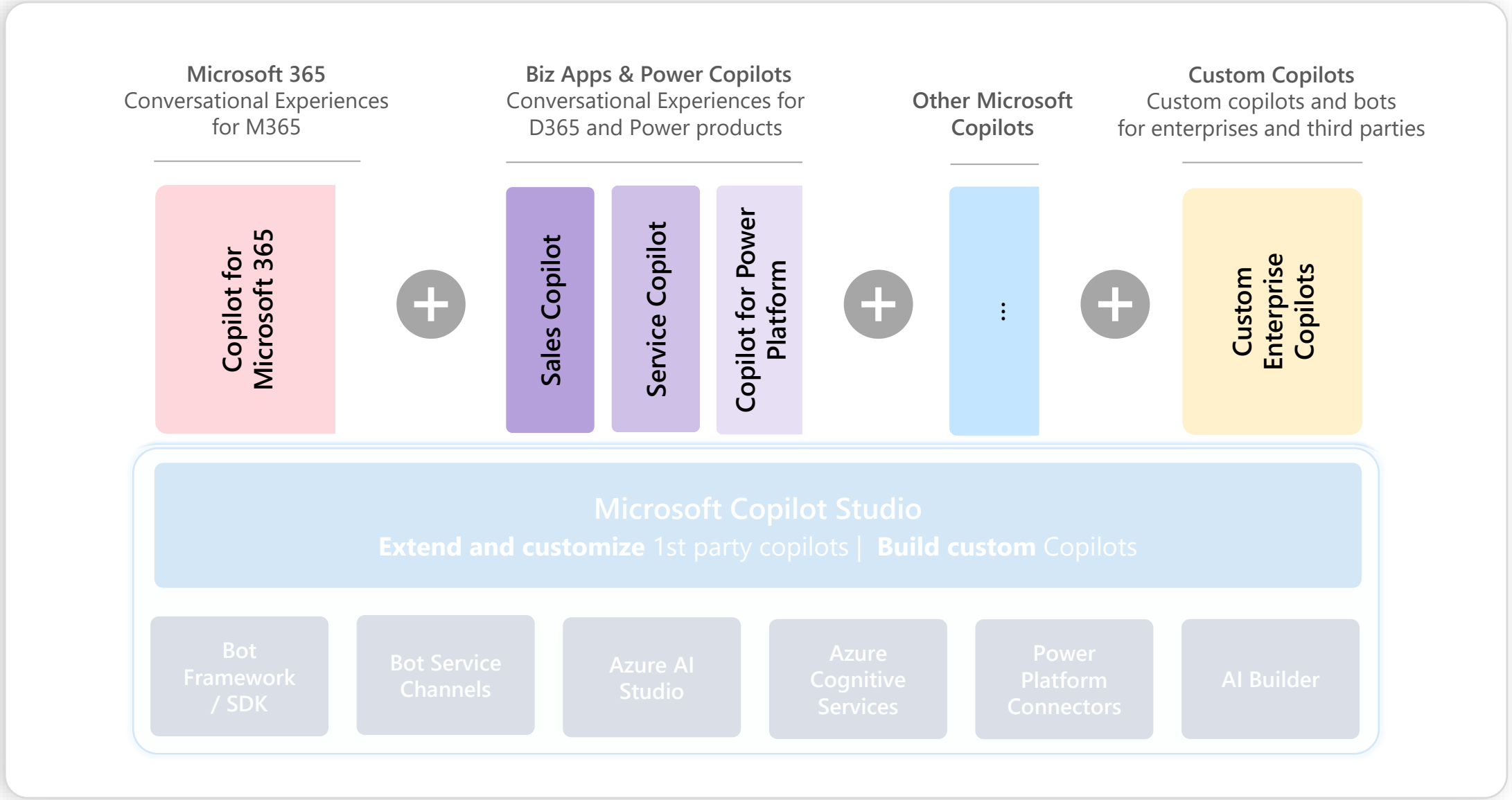
Publish the copilot to **multiple channels, live instantly** on the SaaS service



Actions & Plugins
Create actions , plugins, or use pre-built Power Platform and OpenAI connectors to call your backends and APIs



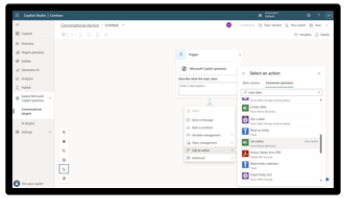
Copilots and Conversational AI



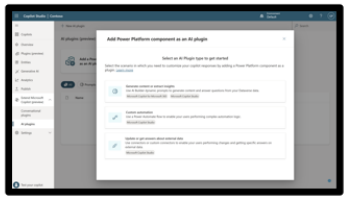
Customizing Copilot

Microsoft Copilot
Answers based on your enterprise data, but cannot natively answer other queries

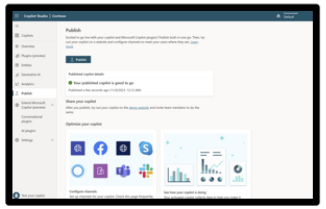
Extend in Copilot Studio
Add reusable AI Plugins (based on pre-built / custom connectors, AI Prompts and Power Automate Flows) or build Conversational Plugins



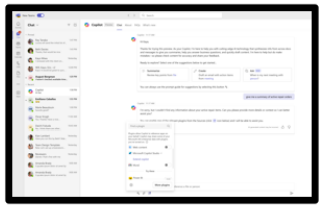
Build a Conversational Plugin
Use the state-of-the-art dialog builder. Using 1000's of connectors, combine multiple data sources and manipulate data



Publish back to Microsoft Copilot
Publish and enable your new plugin in Microsoft Copilot in minutes.



Ask again
Microsoft Copilot is now instantly capable of handling the previously unanswered query.



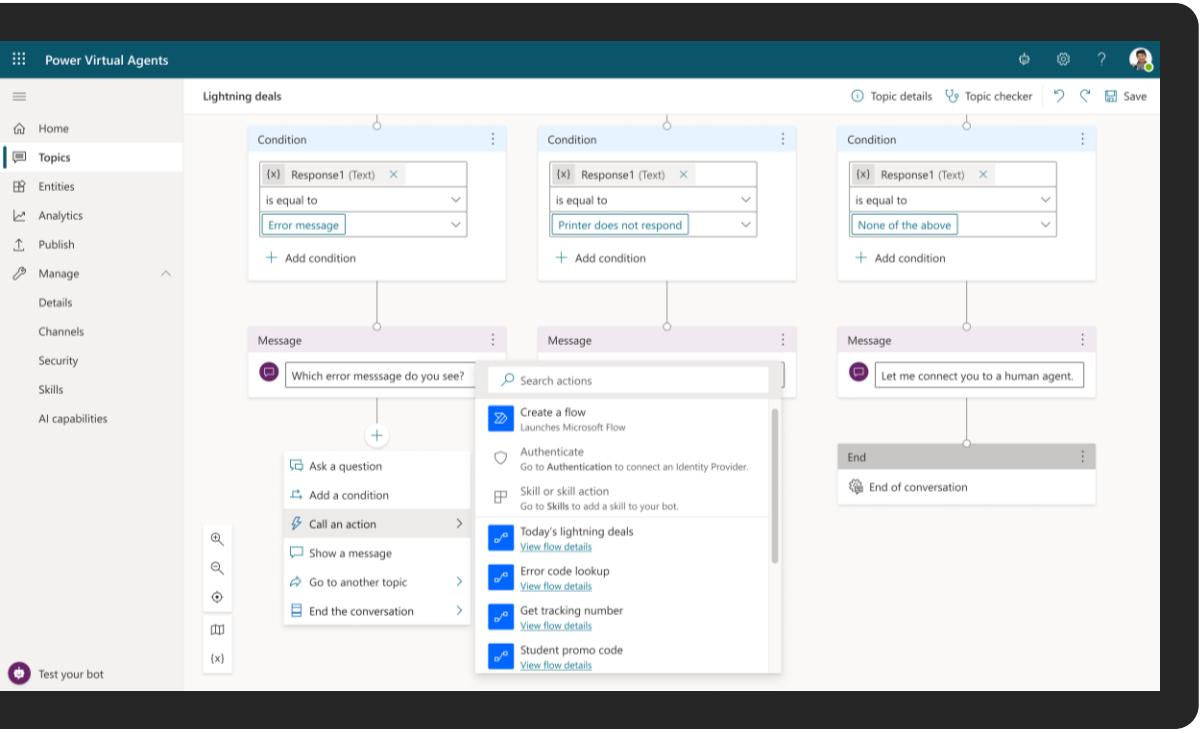
Copilot Studio
The fastest way to build and extend powerful Generative AI Copilots

Copilot Studio

	Internal custom copilots	Customer facing copilots	Extend Copilot for Microsoft 365	
World Class UX	Declarative	Rich Response	Intuitive	Ease of use	Natural language to build
Logic + Automation	Low code logic	Generative Answers + Actions	Power Automate	Custom Azure Skills
Next-Gen AI	Prebuilt LLM	Generative AI	Proactive suggestions	Bring your own Model (BYOM)*
Connected experience	Microsoft Copilot	Power Platform	1000+ Connectors	Azure AI Studio
Copilot Lifecycle	Test Pane	Collaboration	Solution Management	ALM Automation
Security + Governance	Trusted identity	Full visibility	Advanced RBAC	Granular DLP control

Microsoft's end-to-end copilot building platform

Automation studio



Power Automate's digital process automation is included in Power Copilot Studio with 1000+ prebuilt data connectors and automation templates.

3rd party connectors, including custom and on-prem

Connectivity

1 Discover

2 Automate

Use process mining to identify bottlenecks and opportunities for automation

With the Copilot Studio Process Advisor template, get a deeper insight into copilot conversation flows.

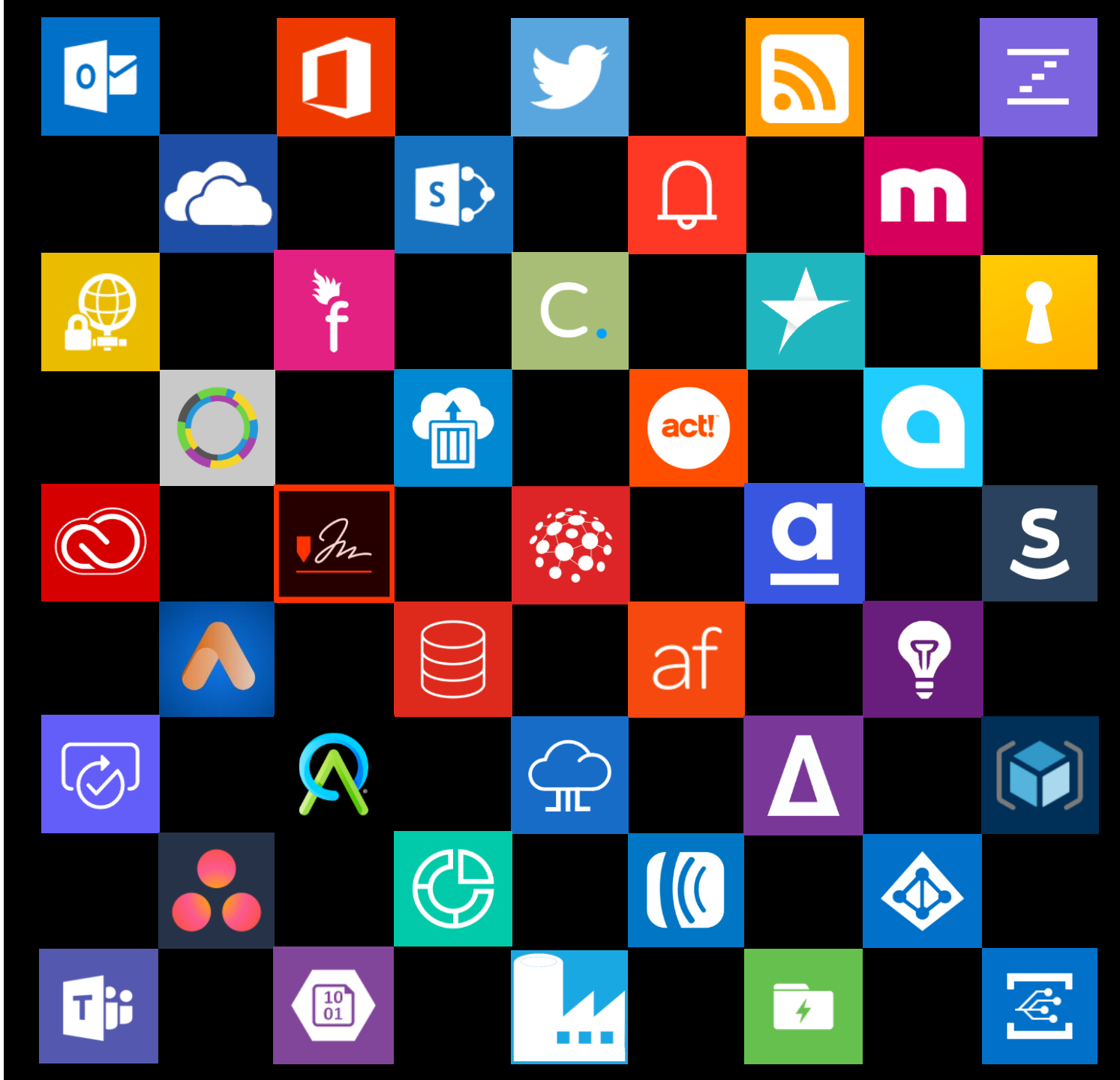
Create solutions by automating business processes with advanced AI, Digital Process Automation, and Robotic Process Automation.

Embed your automation flows directly into the conversation to drive action.

Microsoft

1000+ connected experiences

Connect to more than 1000+ 1st and 3rd party services with built-in connectors for everything from Adobe to Zendesk to on-premises solutions.



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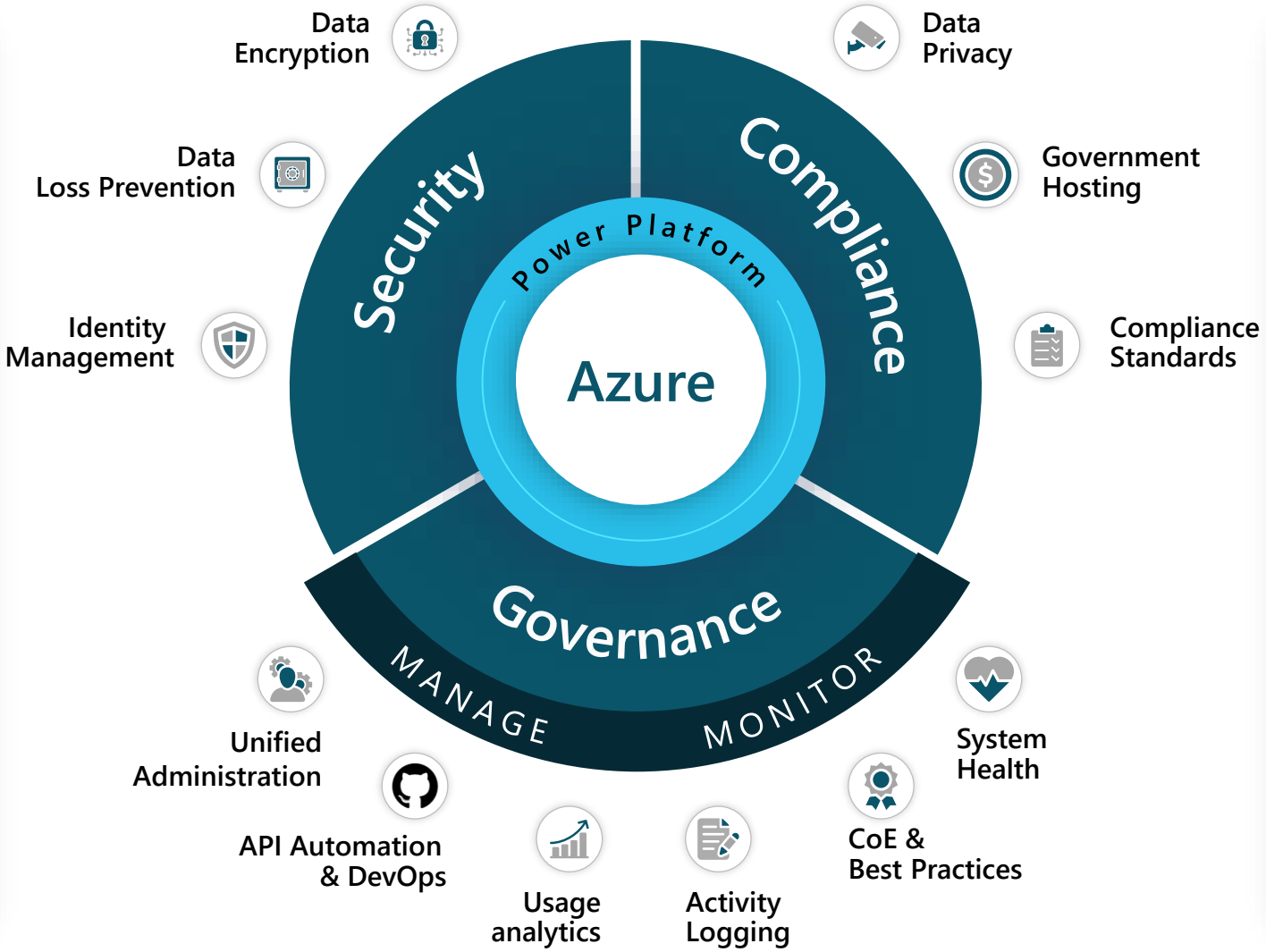
List of supported connectors | Microsoft Power Automate

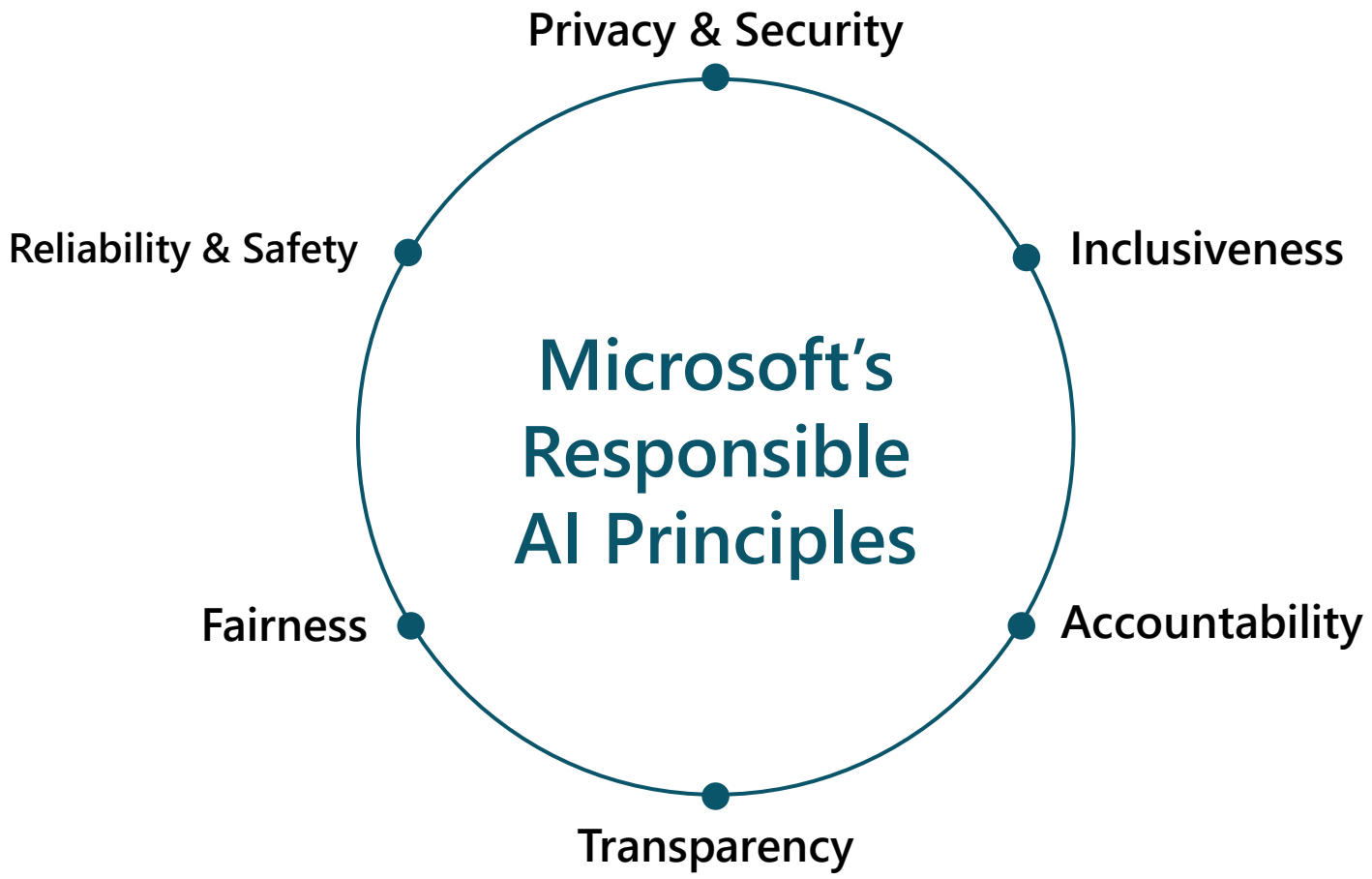
Robust, secure and compliant hosting platform

Compliance leadership
with standards and commitments including ISO 27001, FedRamp and EU model clauses



No standing access to data
transparent operational model and 99.9% financial-backed uptime guarantee

Microsoft's Responsible AI principles



Building blocks to enact principles

- Tools and processes
- Training and practices
- Rules
- Governance

Customer Copyright Commitment

Use Copilot services with confidence

We stand behind our Copilot customers

We are sensitive to the concerns of authors

Copyright guardrails are built into the product

How do you start a project?

Use case building

Building your team

Project planning

Bot building

Testing

Management

Go-live

Post-go live

Https://aka.ms/PVAPlaybook

Lab 01 will include planning and use case building!

Use case building

Building your team

Project planning

Bot building

Testing

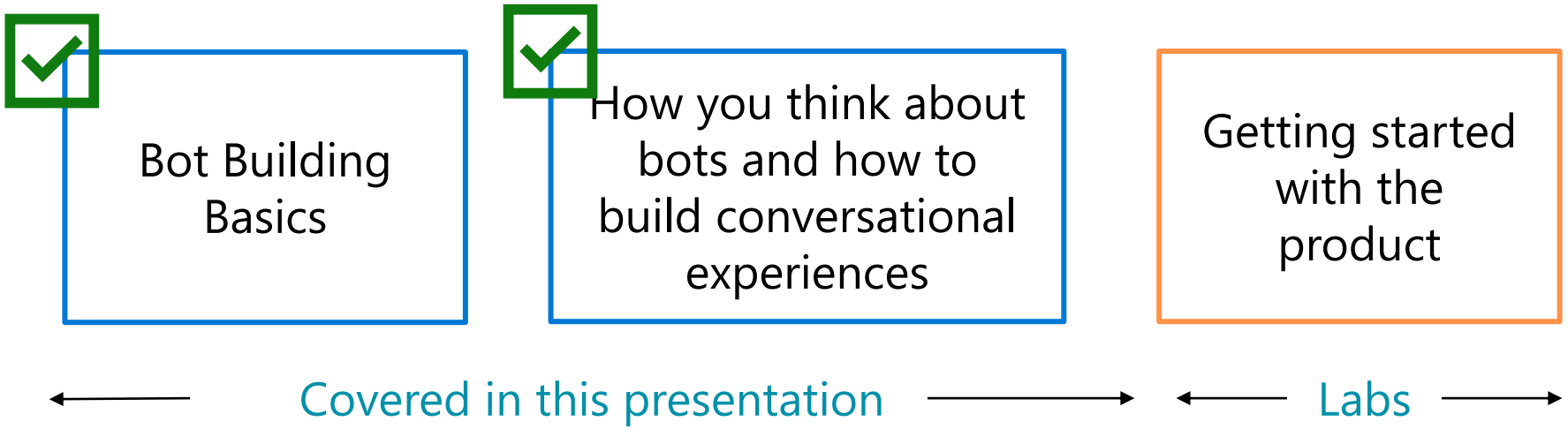
Management

Go-live

Post-go live

Https://aka.ms/PVAPlaybook

This day is broken up by…



Q&A

Get started today

aka.ms/trycopilotstudio

Learn more

Copilot Studio website	aka.ms/copilotstudio
Blog	aka.ms/copilotstudioblog
Demo	aka.ms/copilotstudiodemo
Sizzle video	aka.ms/copilotstudiosizzle
Product documentation	aka.ms/copilotstudiodocs
Ignite on-demand session	aka.ms/copilotstudioatignite
Community page	aka.ms/copilotstudiocommunity

Let’s move on to the Labs!

Go to Microsoft Learn to get started with the Labs!
Link will be provided in your materials

Download the Bot Building Handbook:
https://aka.ms/PVAPlaybook

Download the Implementation Guide:
https://aka.ms/copilotimplemetationguide

Microsoft Power Platform

Let’s move on to the Labs!

Go to Microsoft Learn to get started with the Labs!
https://aka.ms/PVAinaDaypackage

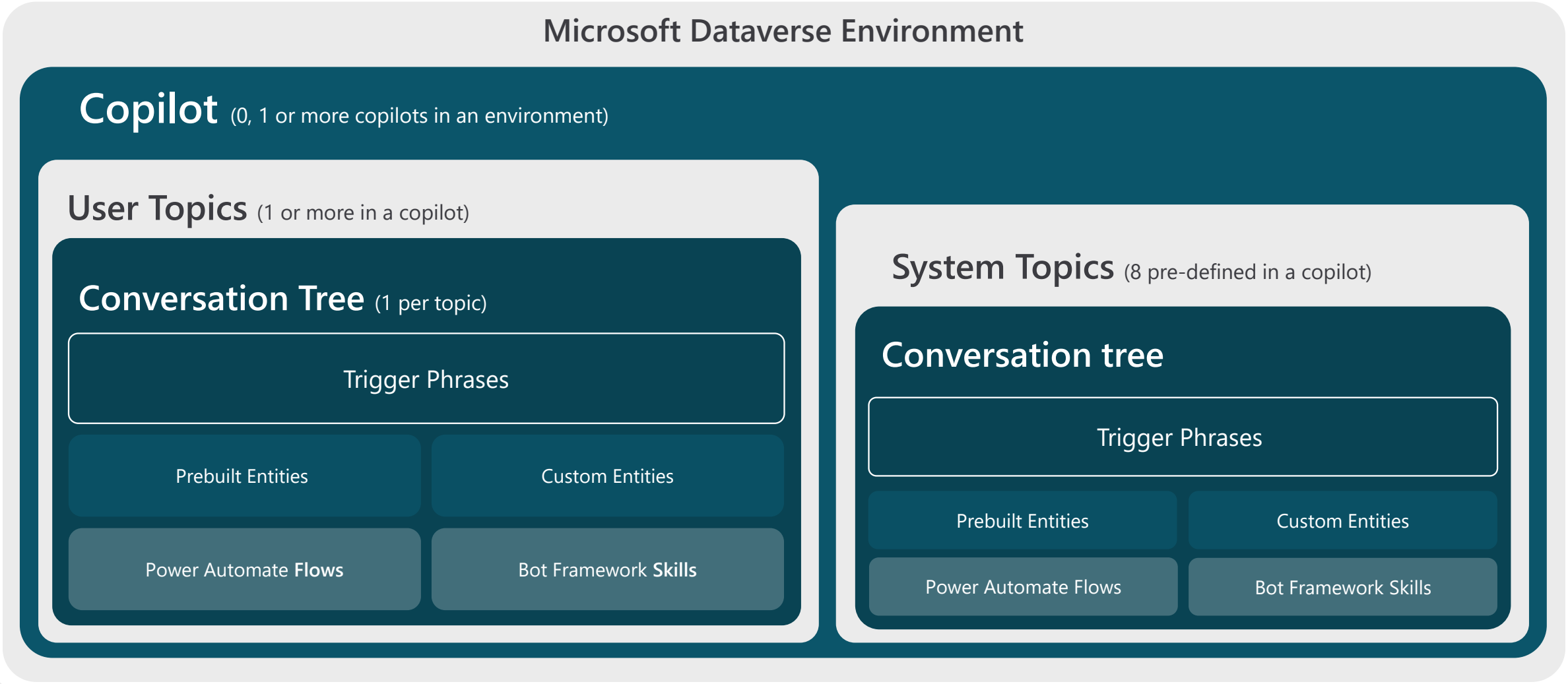
Download the Bot Building Handbook:
https://aka.ms/PVAPlaybook

Microsoft Power Platform

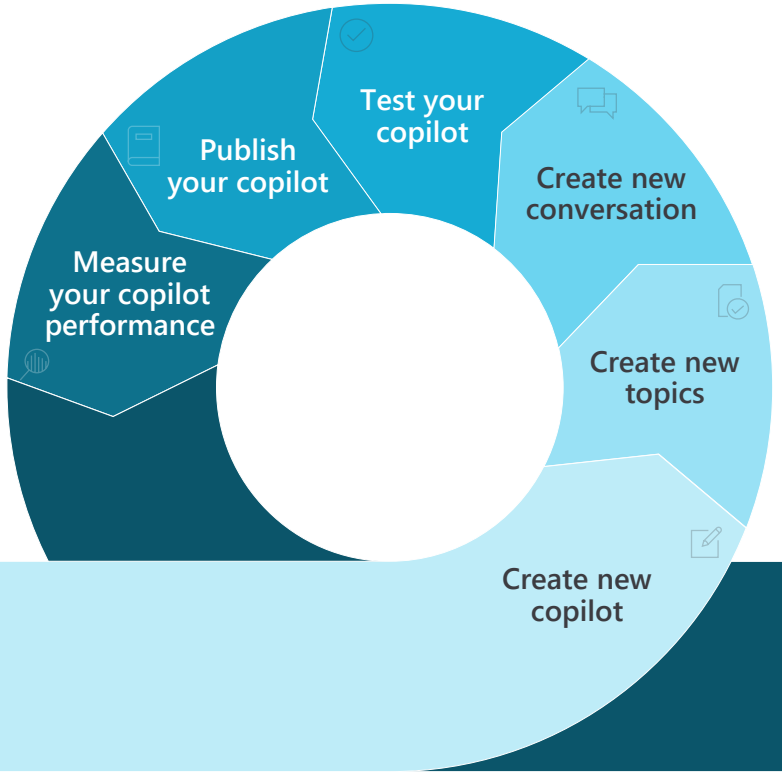
Labs 00 - 04:

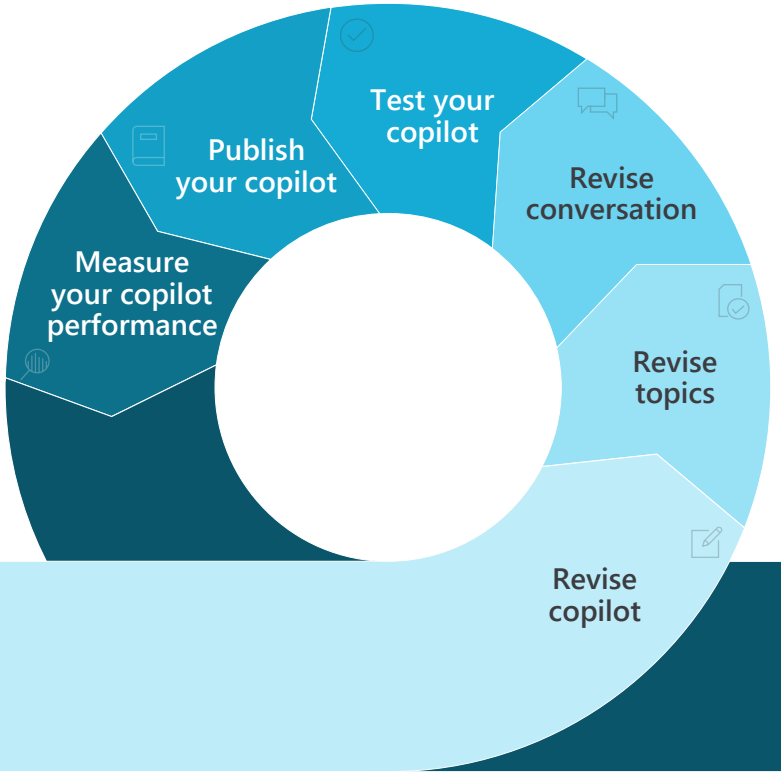
Getting started with Copilot Studio

Copilot Studio Information Architecture



Copilot Creation Process overview



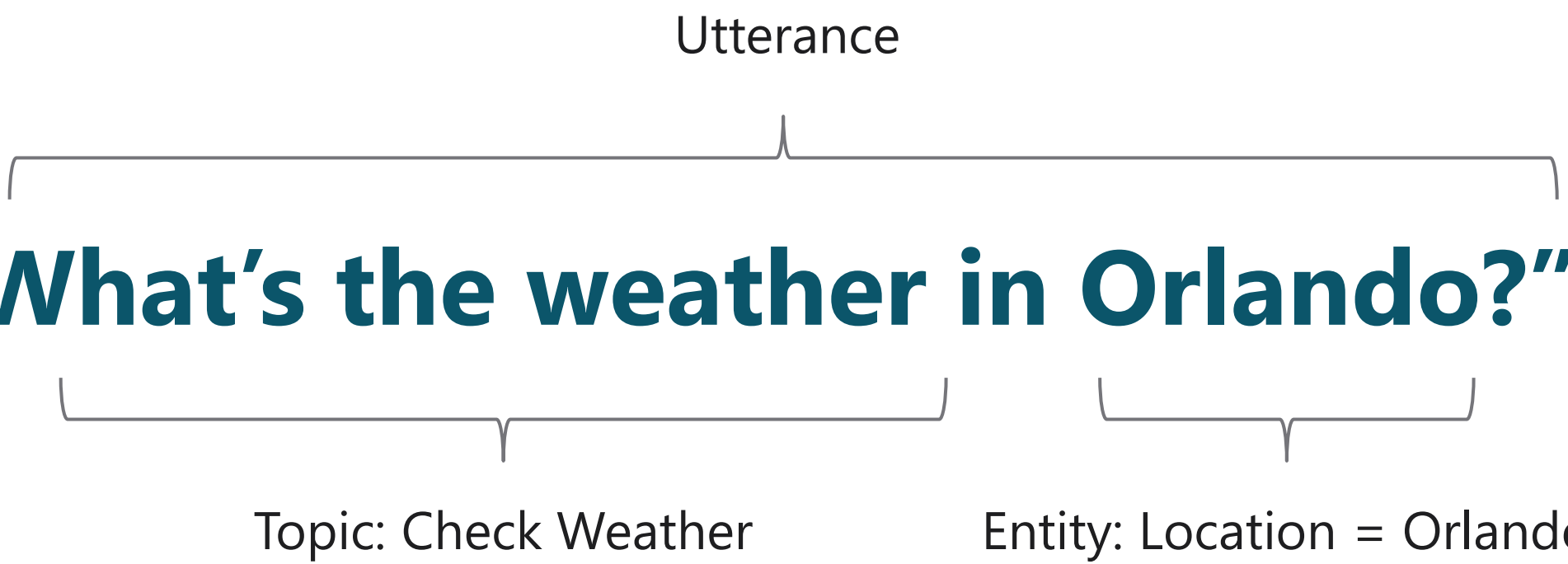


Introduction to Natural Language Understanding

Natural Language Understanding (NLU) is a subfield in Natural Language Processing (NLP).

It focuses on **organizing the user's unstructured inputs** (utterences) so that the copilot can understand and analyze it.

Example in action: topic triggering and slot filling

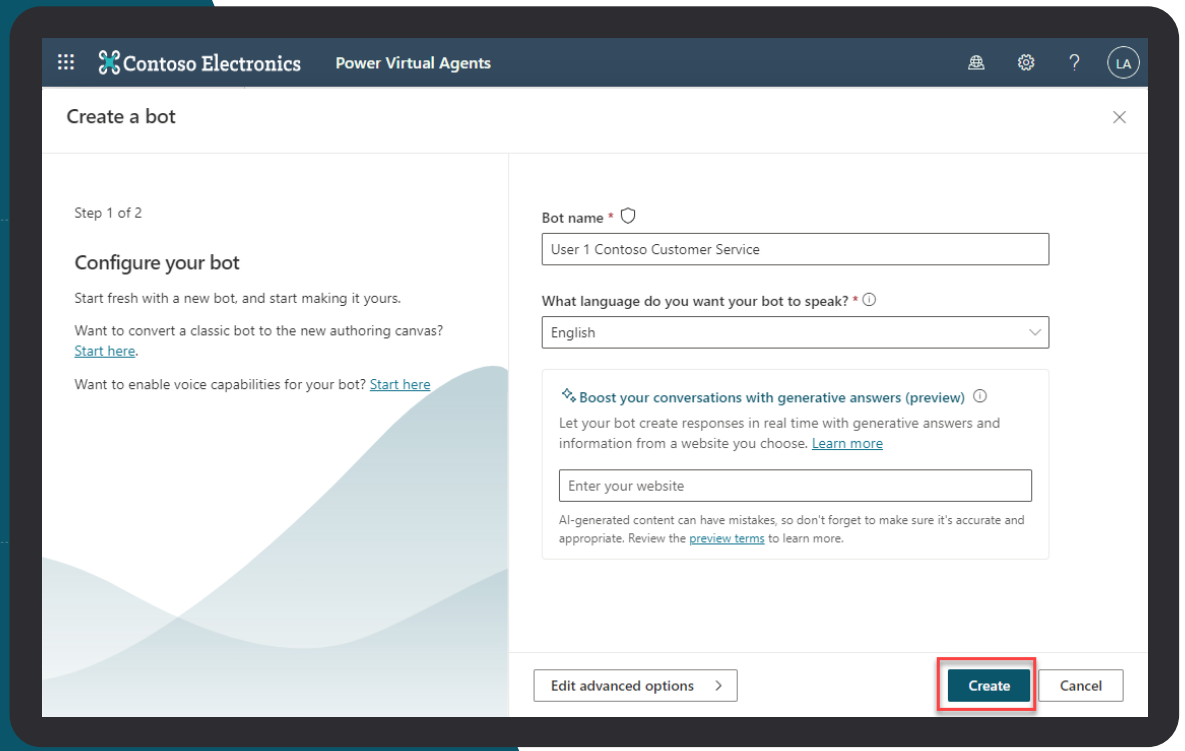


Create a new preview copilot

Open the Copilot Studio designer

Copilot Studio

Select ‘create copilot’

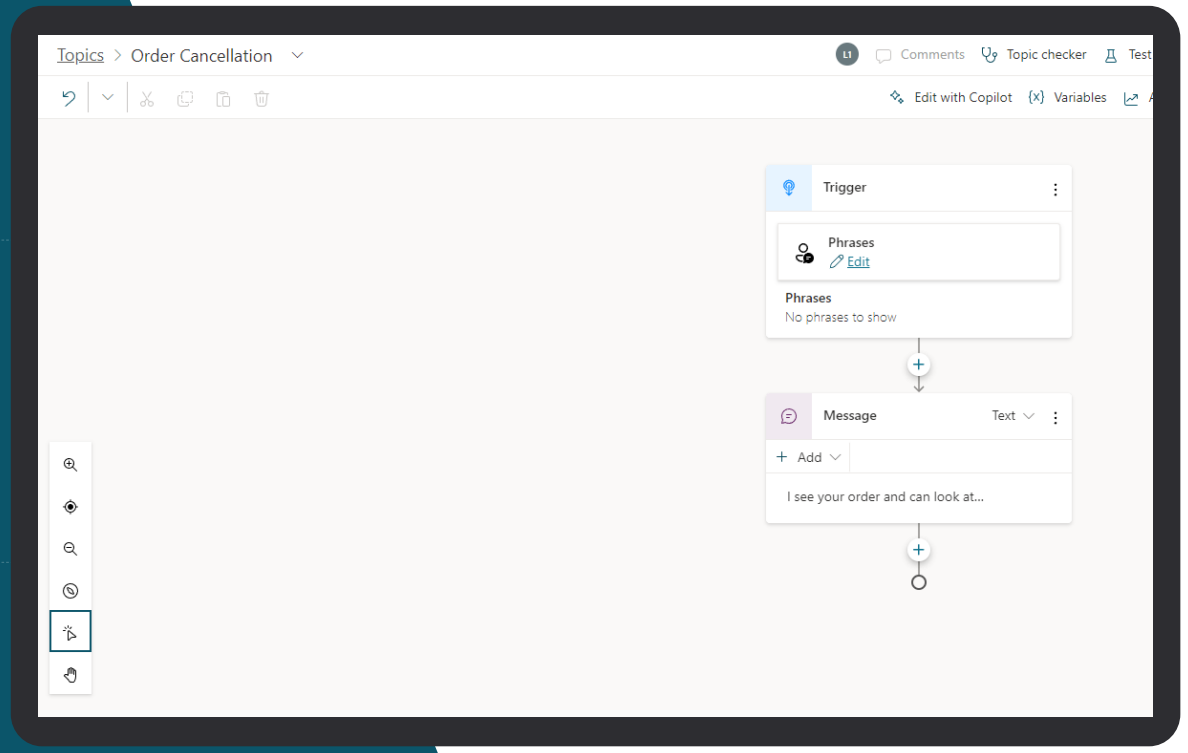


Supported Languages

Copilot Studio supports copilots in many different languages

Copilot Studio Unified Authoring Preview is currently available only in English when creating your Copilot

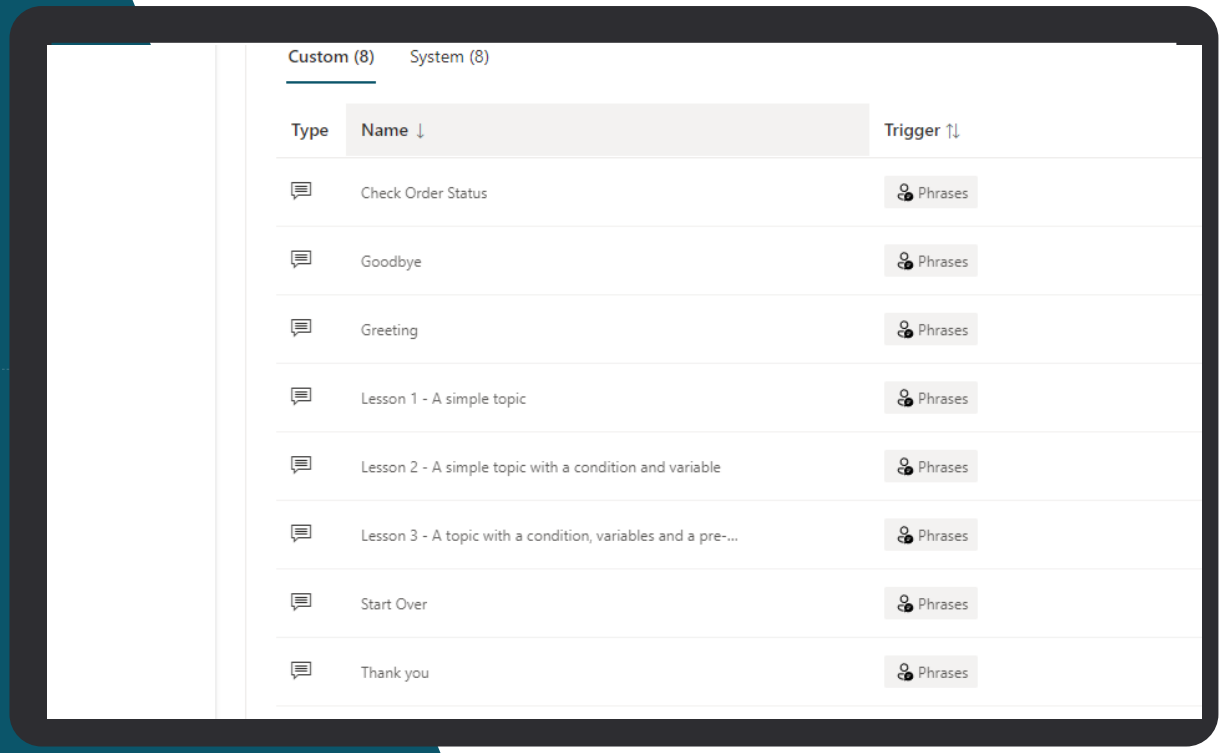
There will be more supported languages throughout Preview



View topics

A copilot comes with 4-7 User topics & 8 system topics

Using one of the 4 topics to get familiar with the structure

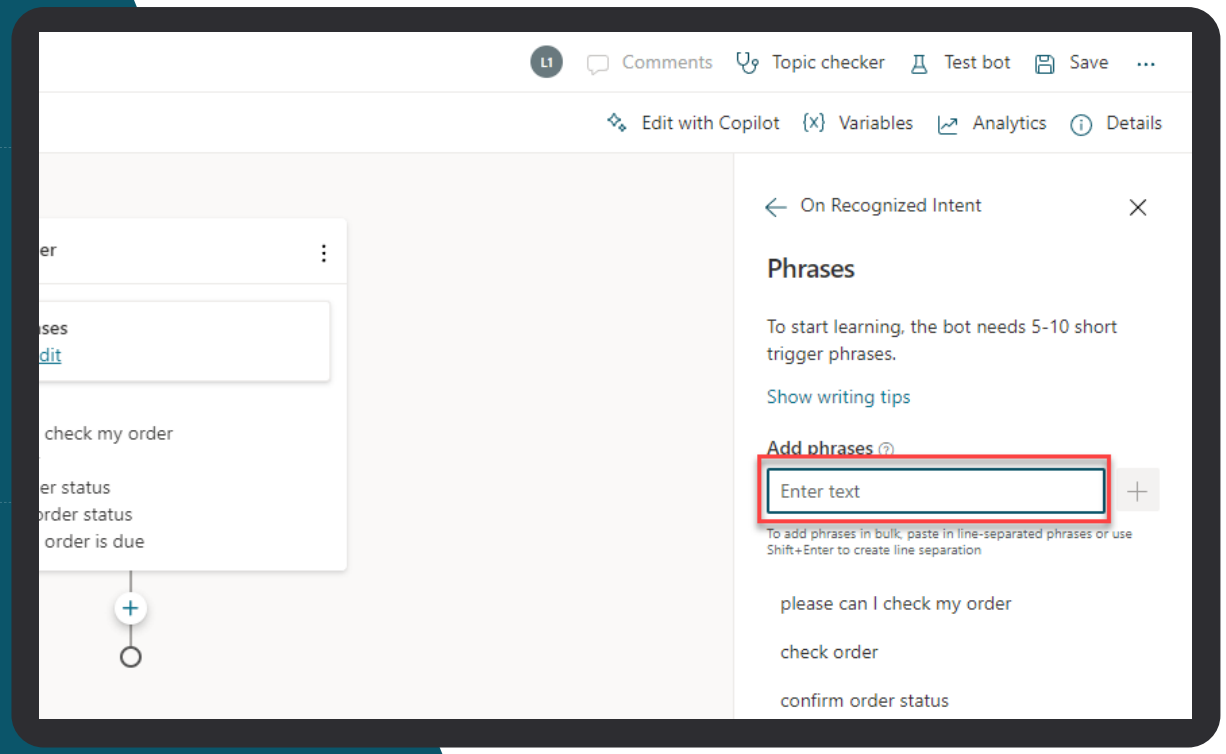


Add conversational trigger phrases

For a topic you'll define a few trigger phrases

A trigger phrase is a way to describe an intent, it captures the way a customer might ask about a problem/issue. E.g., "problem with weeds in lawn"

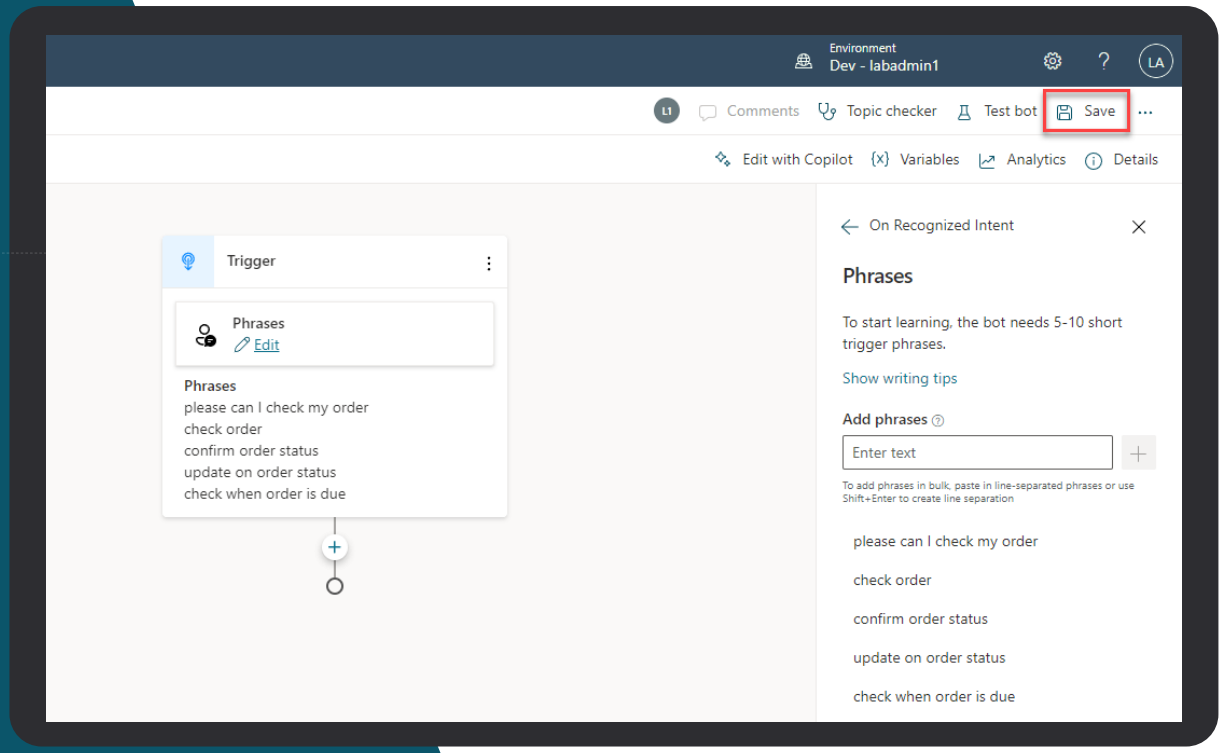
You only need to provide at least 5 phrases – the AI will parse whatever the user says and trigger the topic closest in meaning to the user utterance



Open the authoring canvas and begin editing a topic

Open authoring canvas to view the conversation tree

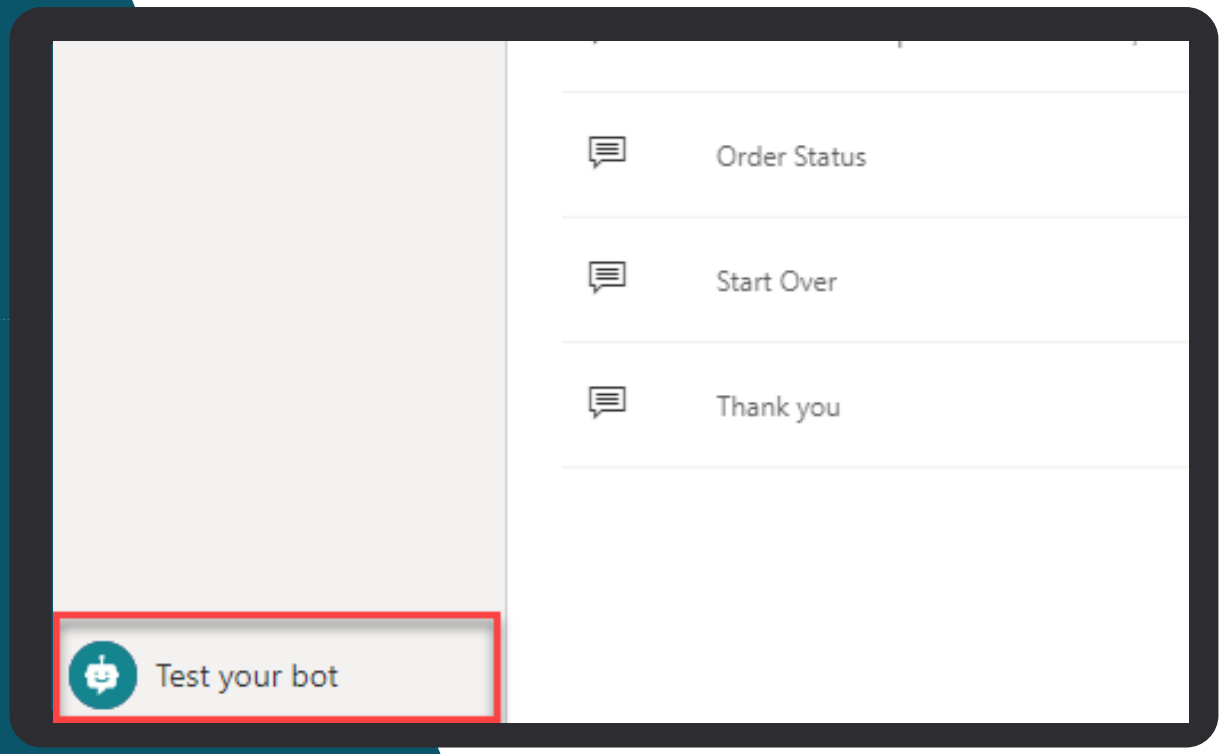
You'll see the trigger phrases at the top. You can edit the conversation tree, adding questions the copilot should ask, things the copilot should say etc.



Test your topic as you construct it

To test what you've created click on test copilot (bottom left) to expand test window

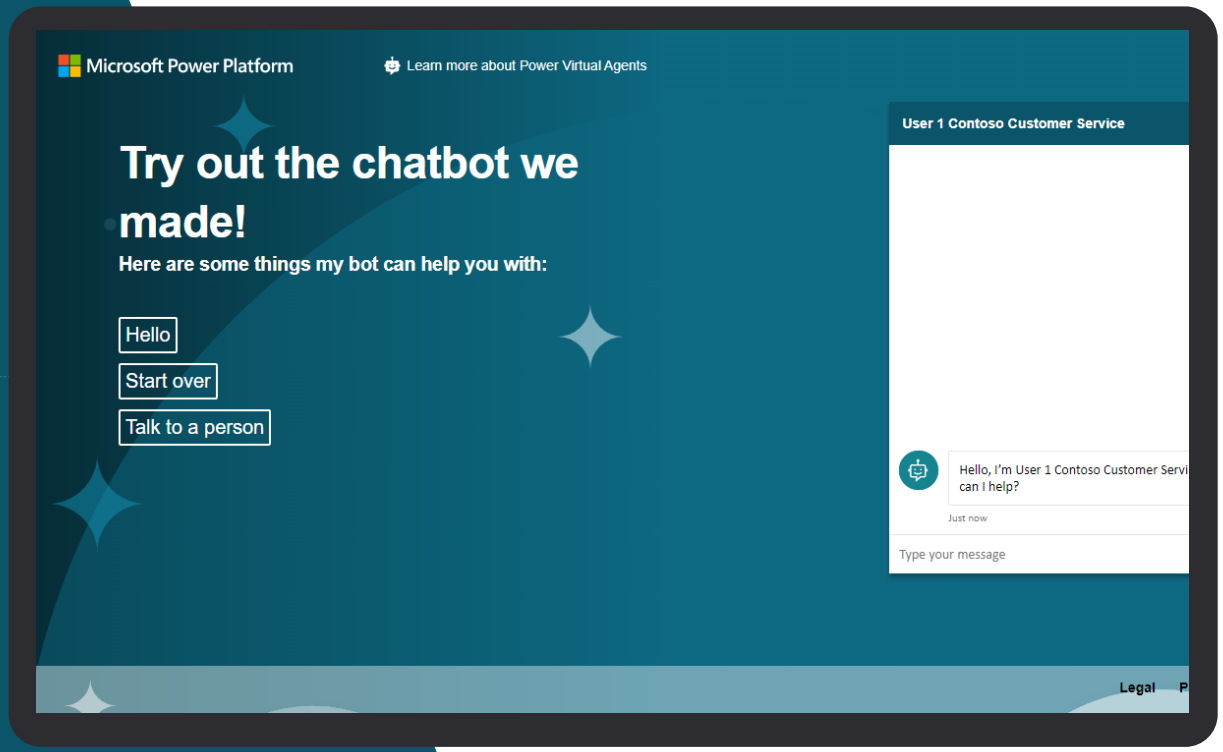
Turn on "Track between topics". This lets you trace your way through both this topic and any others you call



Publish to demo website

Publish to demo website and share the URL with colleagues so they can try the copilot

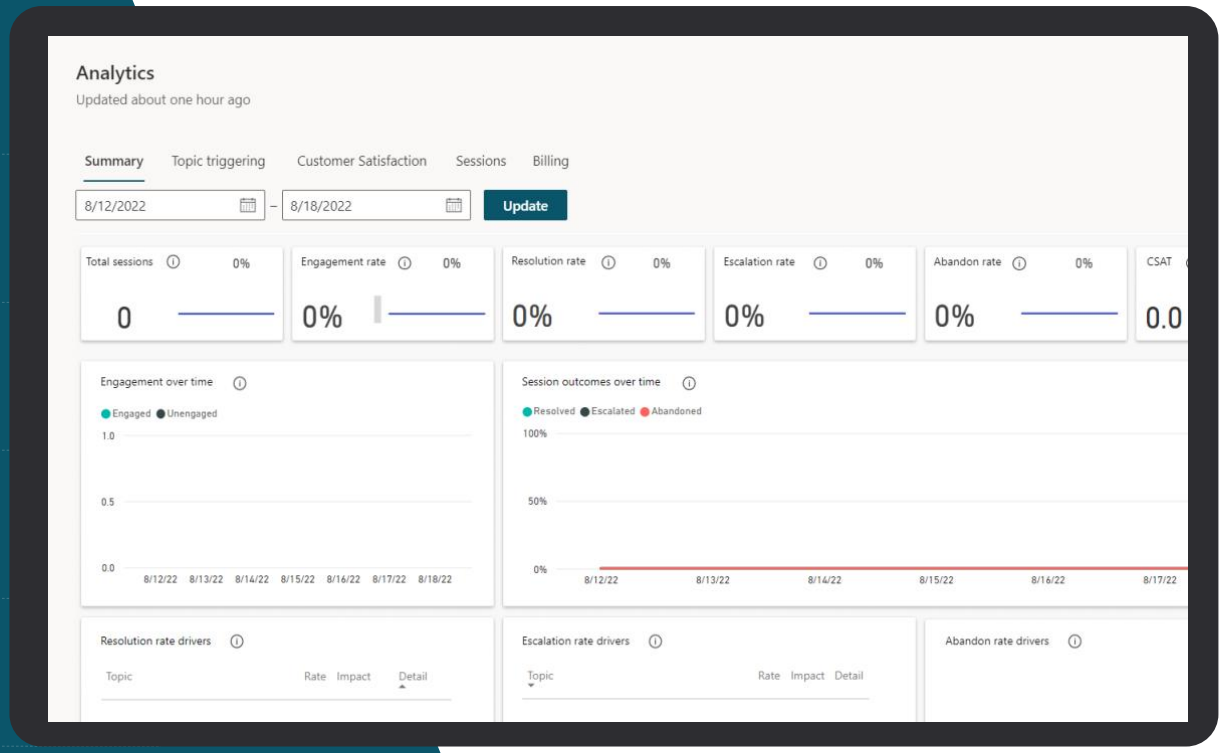
Add screen shot with that publish to demo site show and demo page



Enhance your copilot from Analytics

GAIN VISIBILITY OF MANY PARAMETERS

- Summary charts
- Engagement over time chart
- Session outcomes over time chart
- Resolution rate drivers chart
- Escalation rate drivers chart
- Abandon rate drivers chart



SECTION SUMMARY

Copilot Studio enables users to create a copilot in just minutes

Offers an easy to use designer to help create unique customer copilot experiences

Part of the Microsoft Power Platform

Built on Microsoft Dataverse

Microsoft Power Platform

Lab Introduction

Introducing Contoso Coffee

Welcome to Contoso Coffee! At Contoso Coffee, we are passionate about providing efficient, environmentally sustainable, and innovative coffee products, barista experiences, and services.

Customer support costs have continued to rise as the customer base has grown, and the company can no longer continue to expand the Customer Support team. You have been tasked with finding a solution using Copilot Studio.

Lab Material

Access the Labs on Microsoft Learn:
https://aka.ms/PVAinaDaypackage

Download the Bot Building Handbook:
https://aka.ms/PVAPlaybook

Microsoft Power Platform

Lab 00:

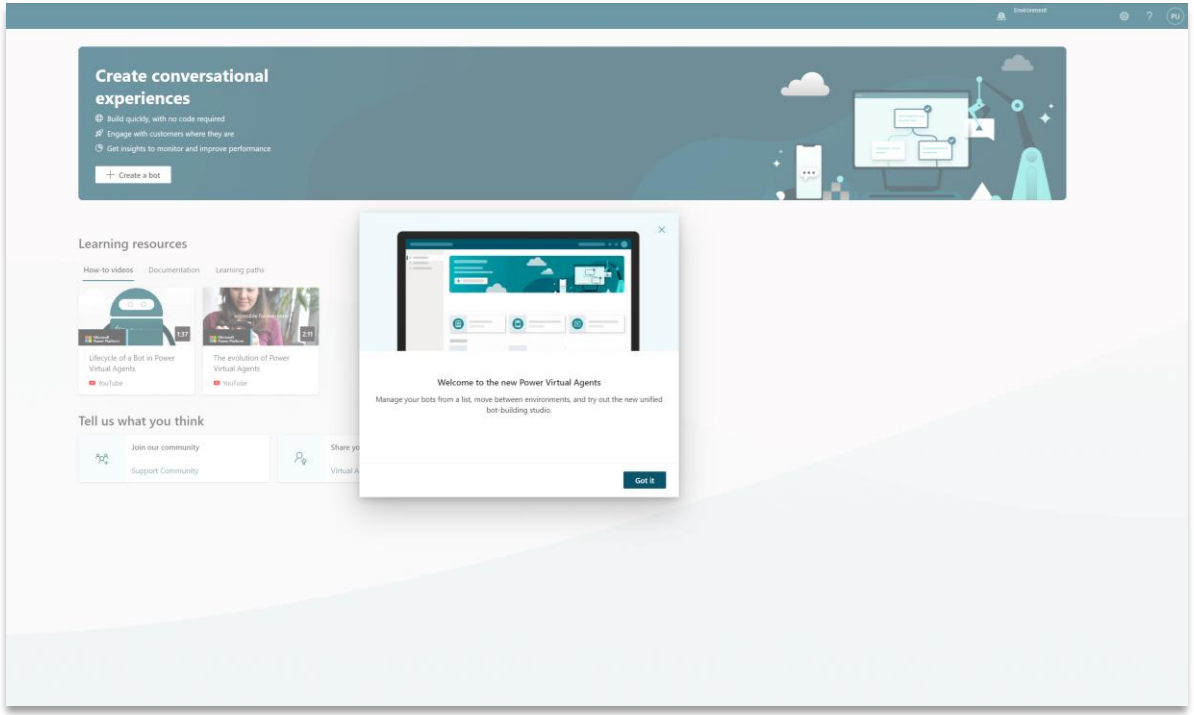
Getting Setup and Access

Setup your Copilot Studio Environment & Log In

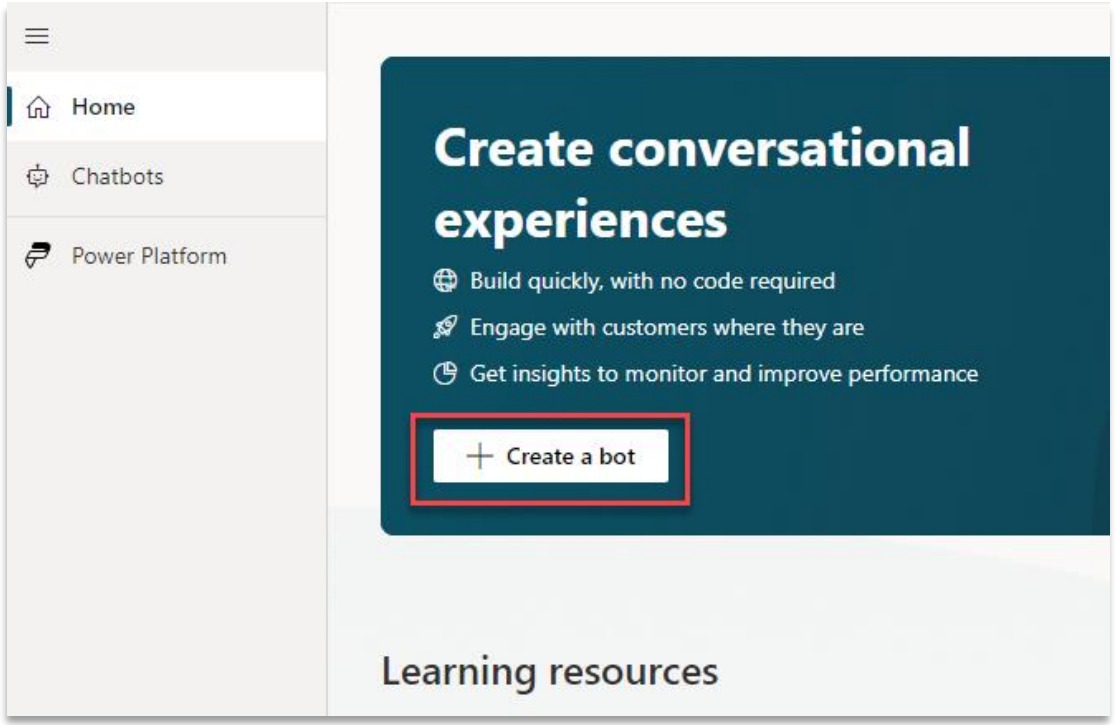
Lab 00

- You should be able to login to your environment using the instructor provided logins
- You will have a Copilot Studio trial license assigned to you
- To test you have access to the latest Copilot Studio Preview functionality, navigate to web.powerva.microsoft.com and you should see the following features when you first log in (next slide)

© Microsoft Corporation



A welcome dialog highlighting the latest version of Copilot Studio



Click ‘Create a copilot’ and you should be able to start the copilot creation wizard

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Microsoft Power Platform

Lab 00:

Checking Access

(Lab Time)

Microsoft Power Platform

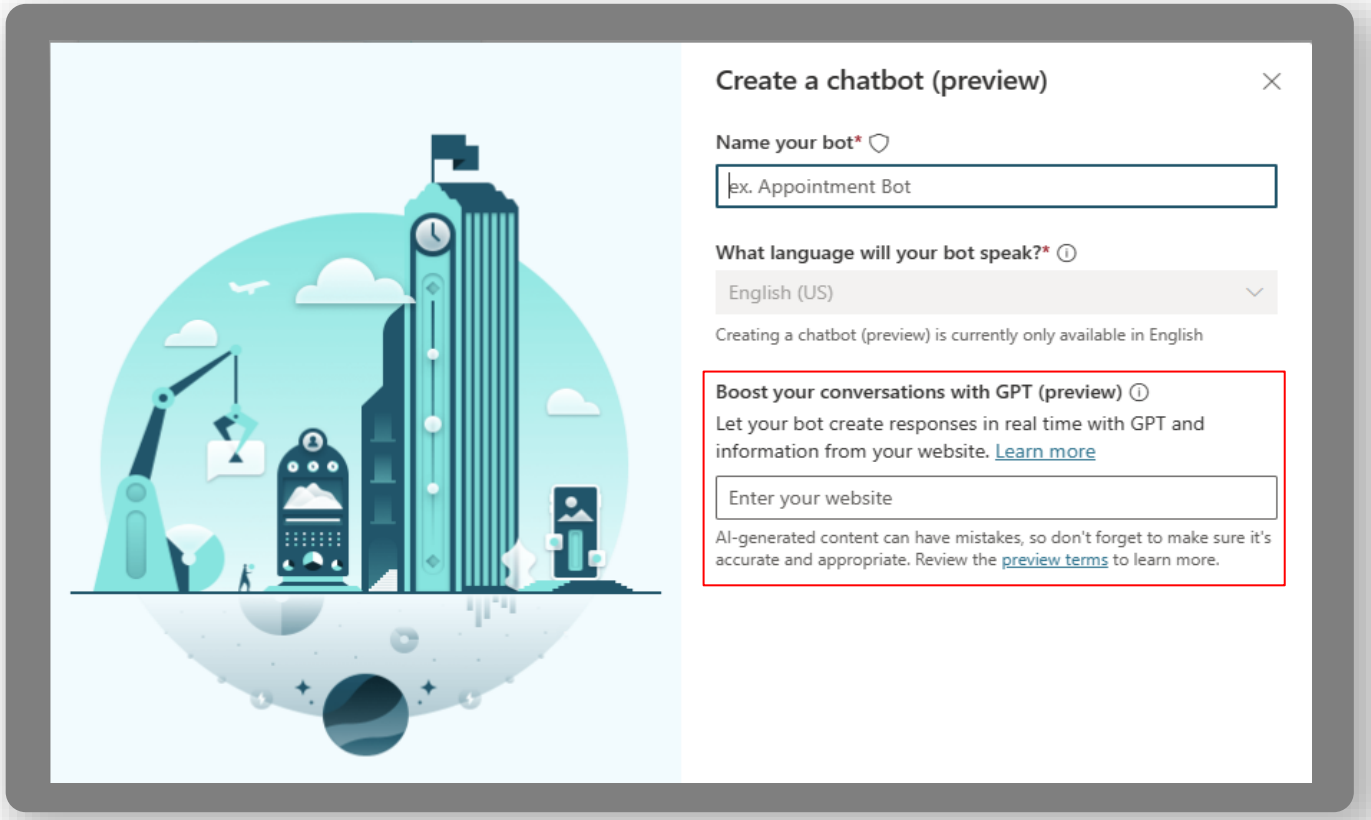
Lab 01:

Planning your first Copilot & Conversational Design

Generative Answers

Public Preview

Make copilots immediately useful by creating responses in real time with GPT without needing to create Topics



- Search web address using Bing and summarize relevant results using GPT
- Dramatically increases the questions that your copilot can answer in seconds without the complexity of creating FAQ or Topics
- Reuse of existing content from your organizations data
- Multiple Sources (Limited Preview)
- Internal Documentation support allowing internal knowledge sources such as SharePoint (Limited Preview

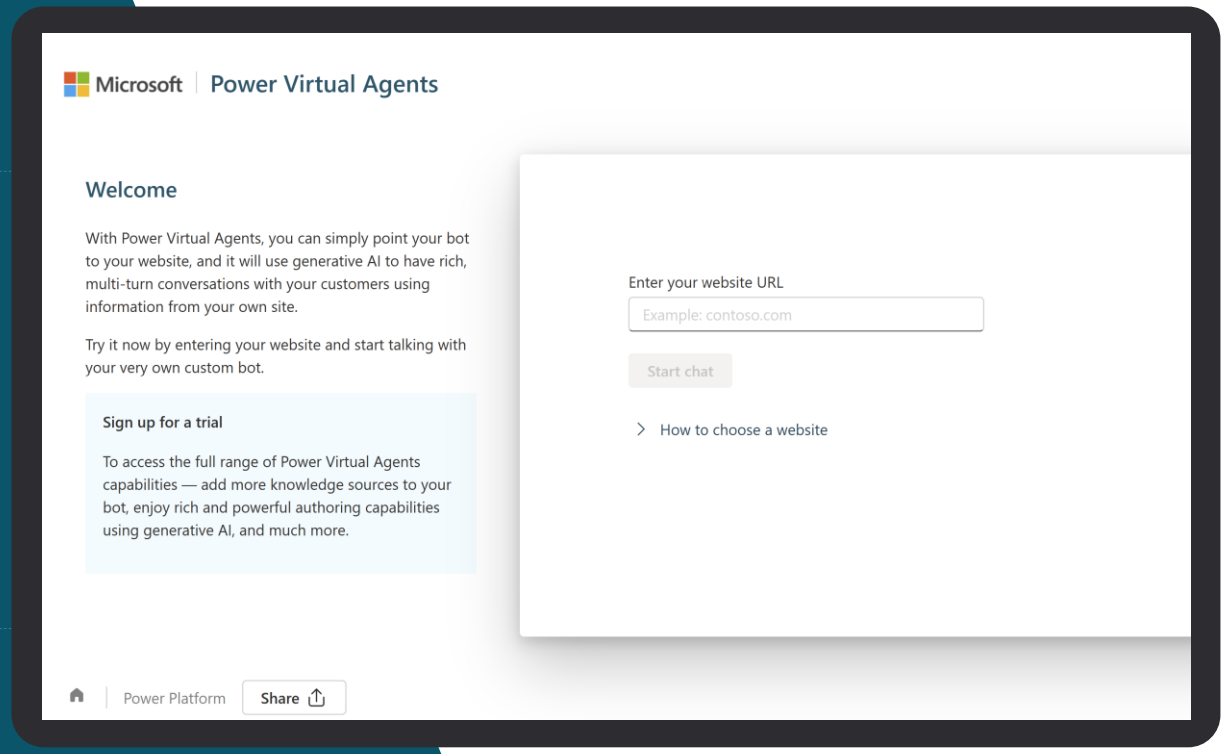
Classified as Microsoft Confidential

Try Generative Answers in Copilot Studio

Try one of the latest features in Public Preview – Generative Answers

Open a new tab in your browser and to to the Try It experience as shown on the screen

Add a public facing website and start asking questions!

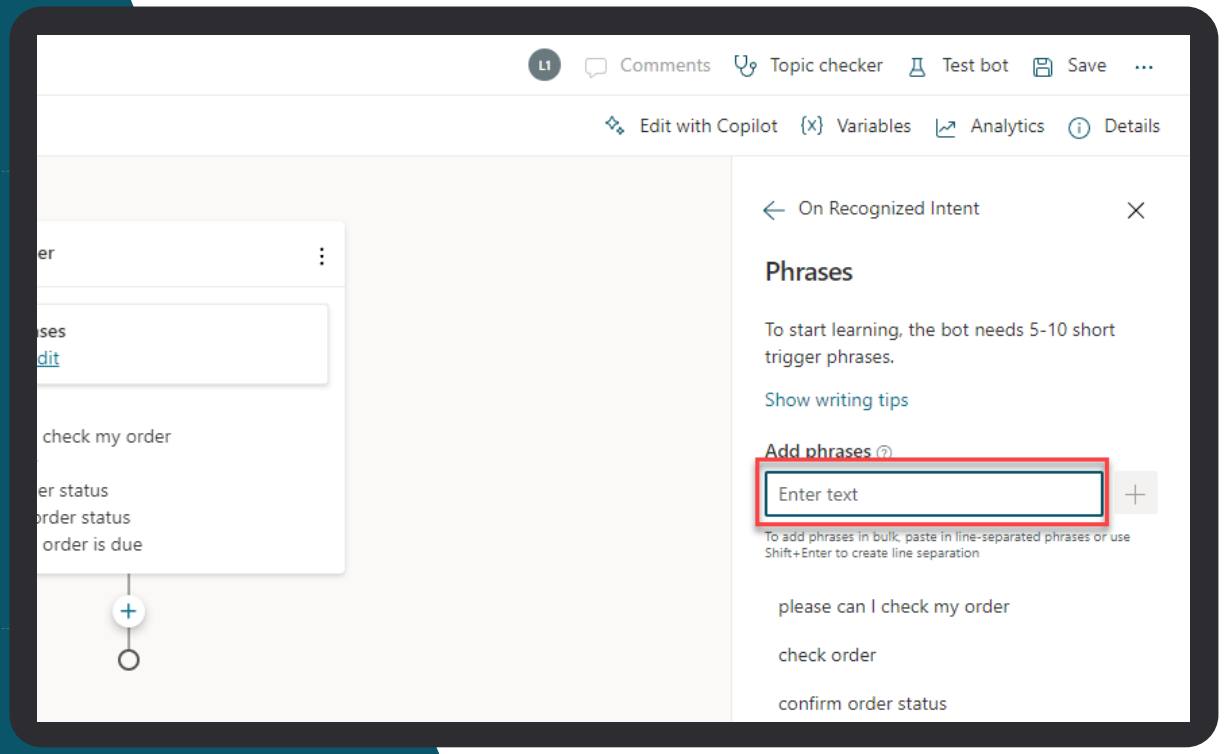


Planning your first copilot - Ideation

Planning your copilot is essential for the success of your project

Setting goals when implementing any business system should be driven from business value

Take your time planning and do not rush

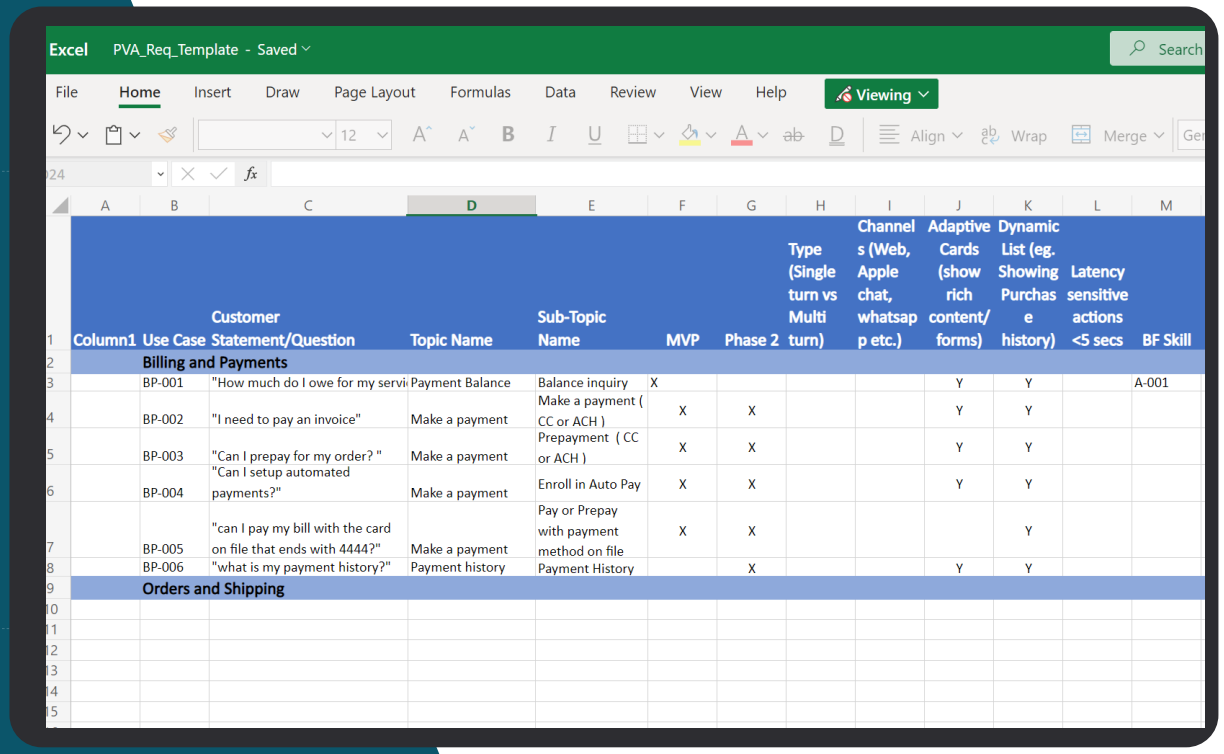


Planning your first copilot – Requirements Gathering

Topic Planning is essential to be able to map the range of topics you want to enable for your users

Use the template provided in the Bot Building Handbook to log key information about the topics

Additional information can be added and developed as you go



	Column1	Use Case	Customer Statement/Question	Topic Name	Sub-Topic Name	MVP	Phase 2	Type (Single turn vs Multi turn)	Channels (Web, Apple chat, whatsapp etc.)	Adaptive Cards (show rich content/ forms)	Dynamic List (eg. Showing Purchase history)	Latency sensitive actions <5 secs	BF Skill
2		Billing and Payments											
3		BP-001	"How much do I owe for my servi	Payment Balance	Balance inquiry	X				Y	Y		A-001
4		BP-002	"I need to pay an invoice"	Make a payment	Make a payment (CC or ACH)		X	X		Y	Y		
5		BP-003	"Can I prepay for my order? "	Make a payment	Prepayment (CC or ACH)		X	X		Y	Y		
6		BP-004	"Can I setup automated payments?"	Make a payment	Enroll in Auto Pay		X	X		Y	Y		
7		BP-005	"can I pay my bill with the card on file that ends with 4444?"	Make a payment	Pay or Prepay with payment method on file		X	X			Y		
8		BP-006	"what is my payment history?"	Payment history	Payment History			X		Y	Y		
9		Orders and Shipping											

What makes a copilot successful?

Knowing your customer

Having accurate, **latest** and effective content

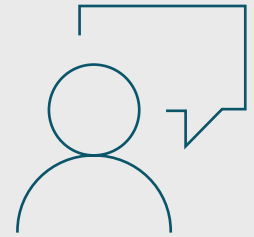
Knowing when to hand off to a human

Understanding the customer's request and connecting it to the right topic

Providing personalized, context-aware help, and taking actions for the customer

Types of conversation topics

People use your copilot with a specific issue (“topic”) to address or resolve. You can loosely categorize topics into 3 types:



Informational

What is…? When will…? Why…?

Task completion

I want to… How do I…?

Troubleshooting

Something isn’t working right. I got an error message

Designing a topic

Identify the topic

- Choose a topic your copilot audience will ask about
- Focus on high-impact topics first
- Put your customer empathy hat on … topic design requires understanding both sides of the conversation

List all scenarios

- List all possible scenarios
- Think about informational needs, task completion, and troubleshooting

Design a high-level conversation tree

- Use your favorite tool to draw the conversation tree
- What is the fewest number of questions you can ask to understand the situation enough to provide the right solution?
- Integrate with Power Automate to personalize and speed issue identification

Design solutions

- Make answers clear and concise so users can scan information quickly
- Integrate with Power Automate to take action on the user's behalf

Validate and iterate on the design

- Read the dialog out loud before publishing
- Get analytics and read session transcripts for further optimization

Microsoft Power Platform

Copilot conversation styles

Qualities of a good conversation

Cooperative

Goal-oriented

Fast

Turn-based

Truthful

Polite

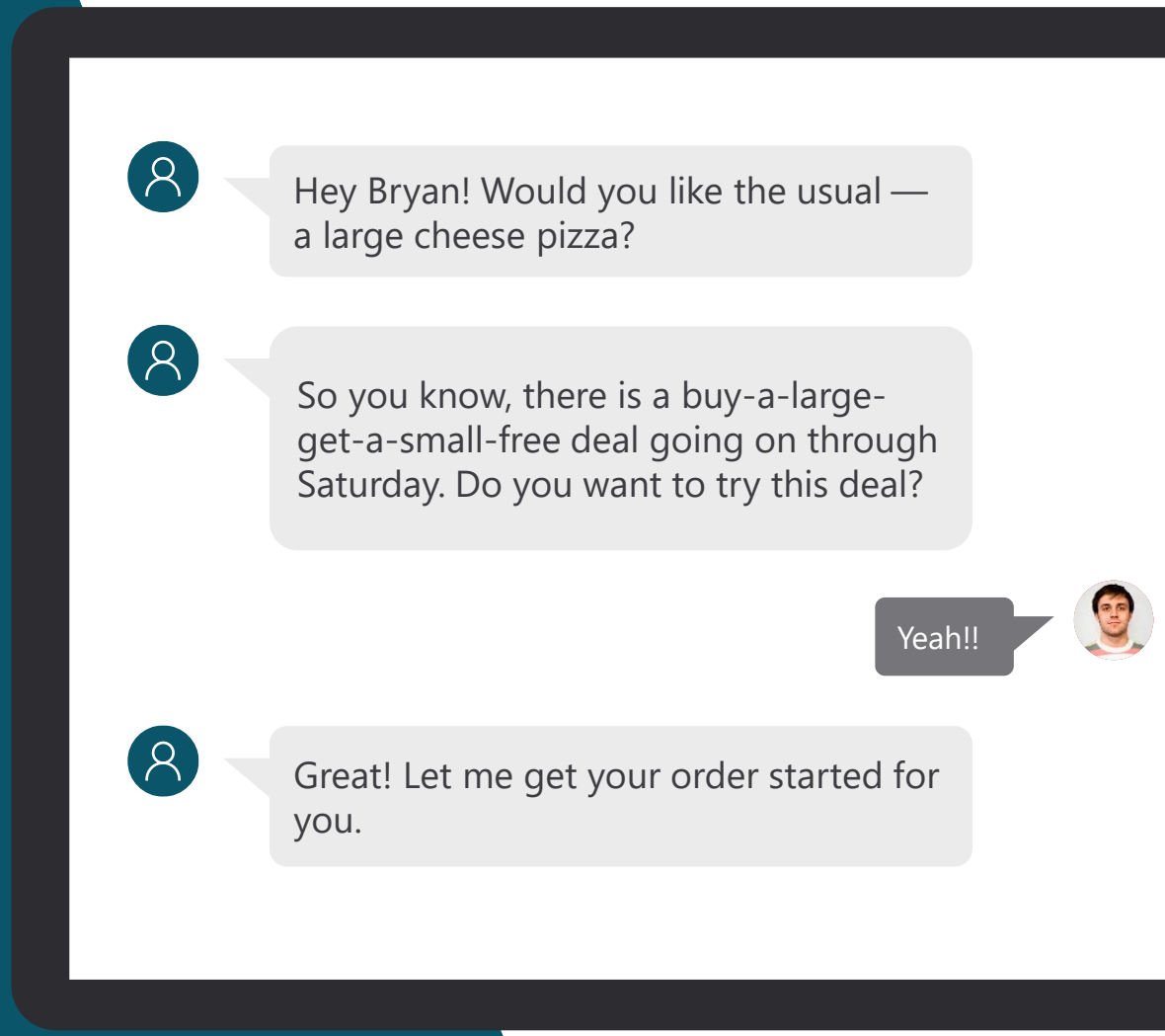
Source: Erika Hall, Conversational Design

Style: How to sound conversational 1/9

Customer conversations should emulate the best elements of any conversation — personal and polite, friendly and supportive

A few stylistic changes in writing can impart warmth and familiarity to your brand voice

Don’t overuse exclamation points to convey energy. It’s easy to rely on them for this purpose, but too many, in the wrong places, could be interpreted as insincere and robotic



Style: How to sound conversational 2/9

Use short sentences

Sounds great! Let me get that started for you.

Be positive

Let's get started. I have a couple questions. Should only take a minute.

Use active voice

No problem. I can resolve this for you.

Style: How to sound conversational 3/9

I'm going to ask you a couple questions. It should only take a minute.

Great.

Use contractions: "I'm" instead of "I am."

Good choice. I have a couple suggestions based on what you've selected.

Select a pronoun to represent your brand agent in chat and be consistent: "I" or "we."

Style: How to sound conversational 4/9

Be consistent with tone and style so the conversation sounds like it's with the same agent and brand

Do

Hi there. Welcome to the Store Assistant. I can help you make a return or exchange.

Let me know at any time if you'd like to chat with a live customer service agent.

I want to return an item

OK. Could you provide your order number, please?

Don't

Hi there. Welcome to the Store Assistant. I can help you make a return or exchange.

If you wish to be in contact with a live customer service agent in regards to your problem, please click the button below.

Tone shifts to formal

I want to return an item

OK. Provide your order number.

Demanding tone

Style: How to sound conversational 5/9

If you're using website documentation to answer a question, break sections down into short, scannable graphs

Do

How to reset your password:

1. Go to https://account.live.com/password/reset.

2. Select the reason for resetting your password and the alternate contact info where you can receive a security code to verify your identity.

Note: This alternate contact info is part of the security info you already added to your Microsoft account.

Don't

How to reset your Password
If you cannot remember your password, go to https://acount.live.com/password/reset and select the reason for resetting your password. Then include the alternate contact info where you can receive a security code to verify your identity. Note: This alternate contact info is part of the security info you already added to your Microsoft account.

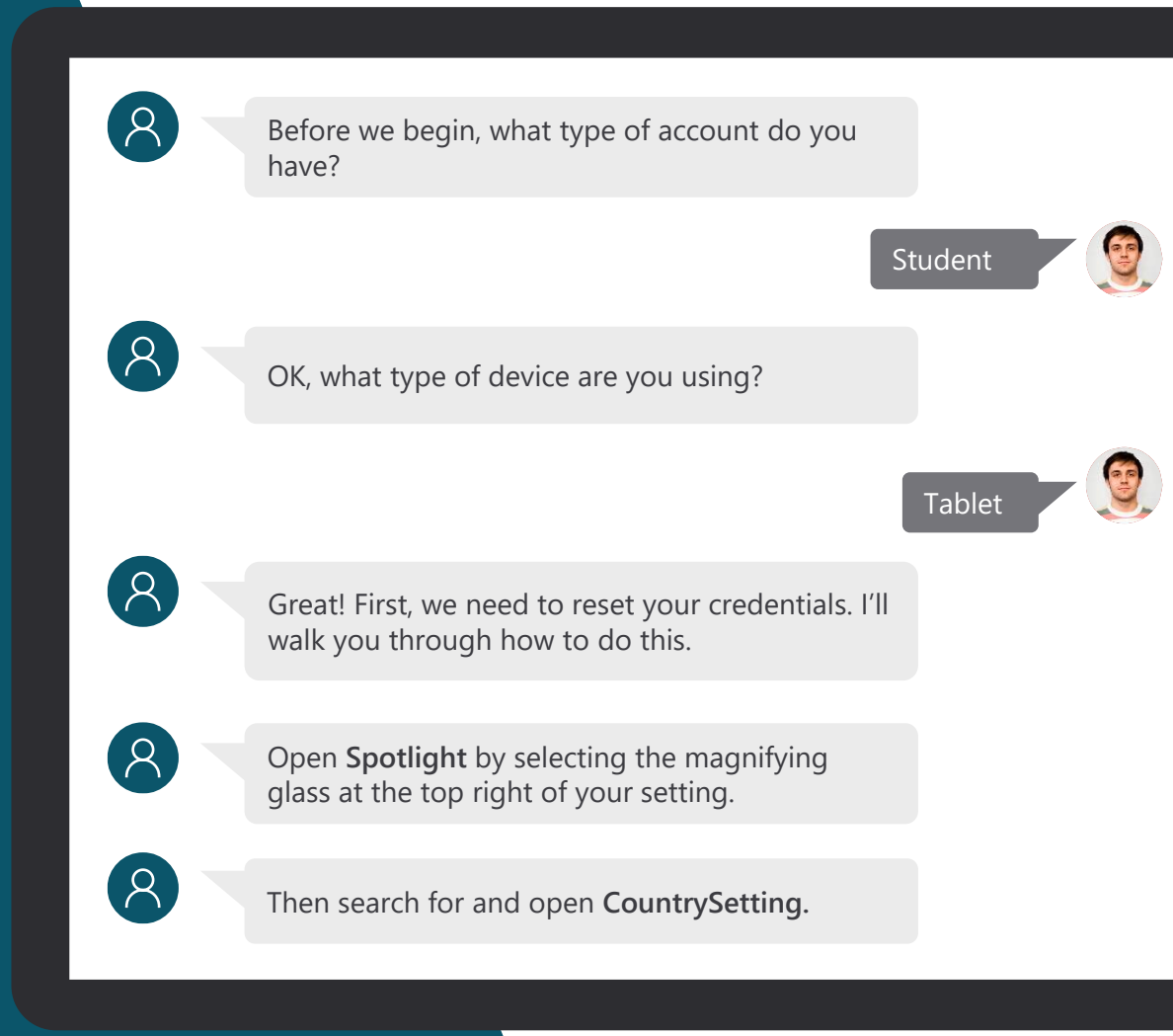
Style: How to sound conversational 6/9

Pace the conversation in short, scannable units

Break up messages into separate, readable blocks to make the pace of the conversation feel more natural

Make sure the copilot doesn't respond so quickly that it rushes the customer. Add a minimum delay
if necessary

Check in to make sure the user is following the conversation after explaining or answering a question, particularly a complex one

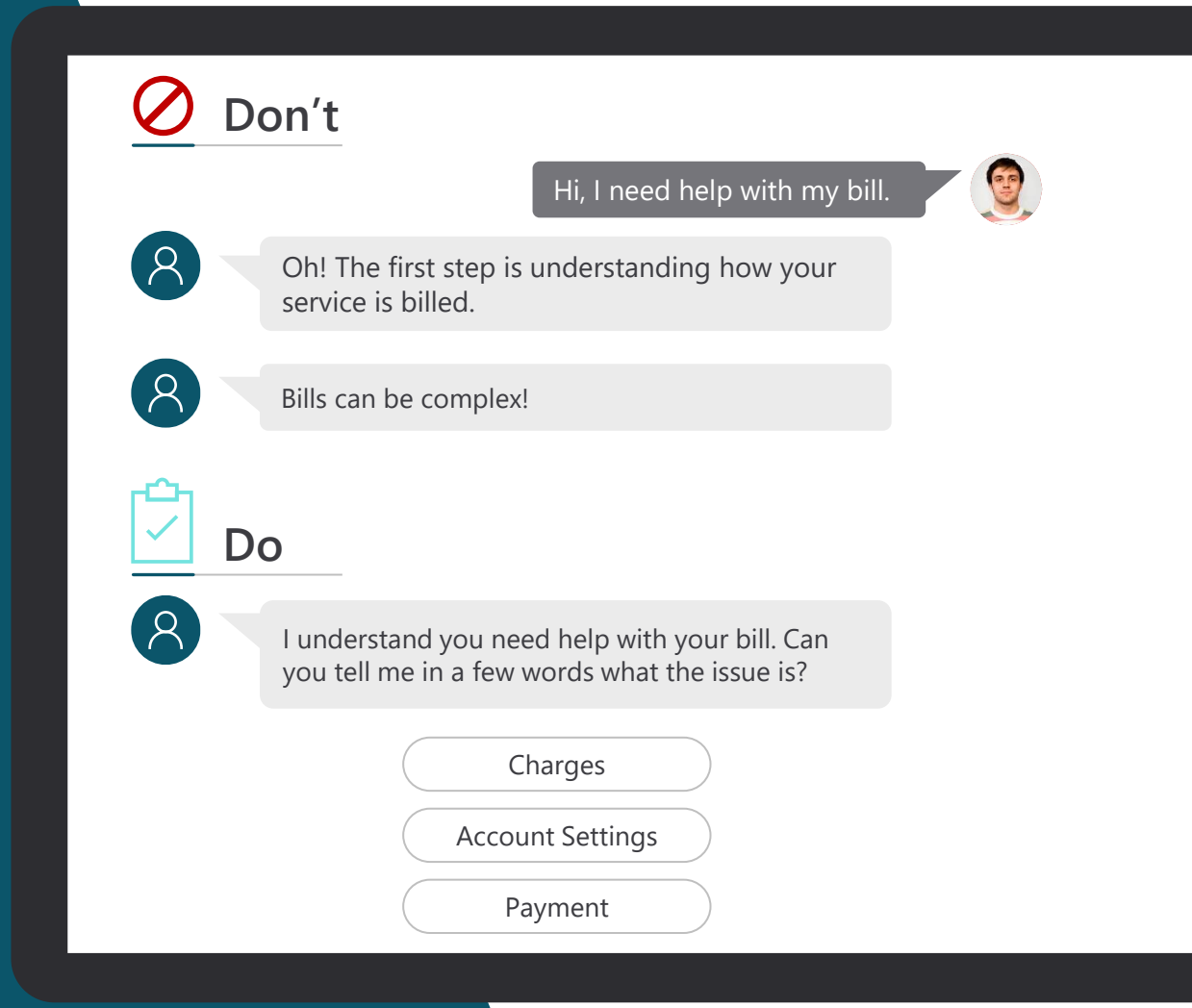


Style: How to sound conversational 7/9

Maintain a friendly tone when helping to complete the task

Tailor the tone of the copilot's responses to the context. If it's something serious—like billing or cybersecurity—be empathetic but brief and straightforward. If it's a more mundane situation (like creating a new account), the tone can be more relaxed.

Exclamation points don't express energy or excitement. Strong writing does, particularly strong verbs. In your desire to help, avoid sounding condescending or insincerely enthusiastic.

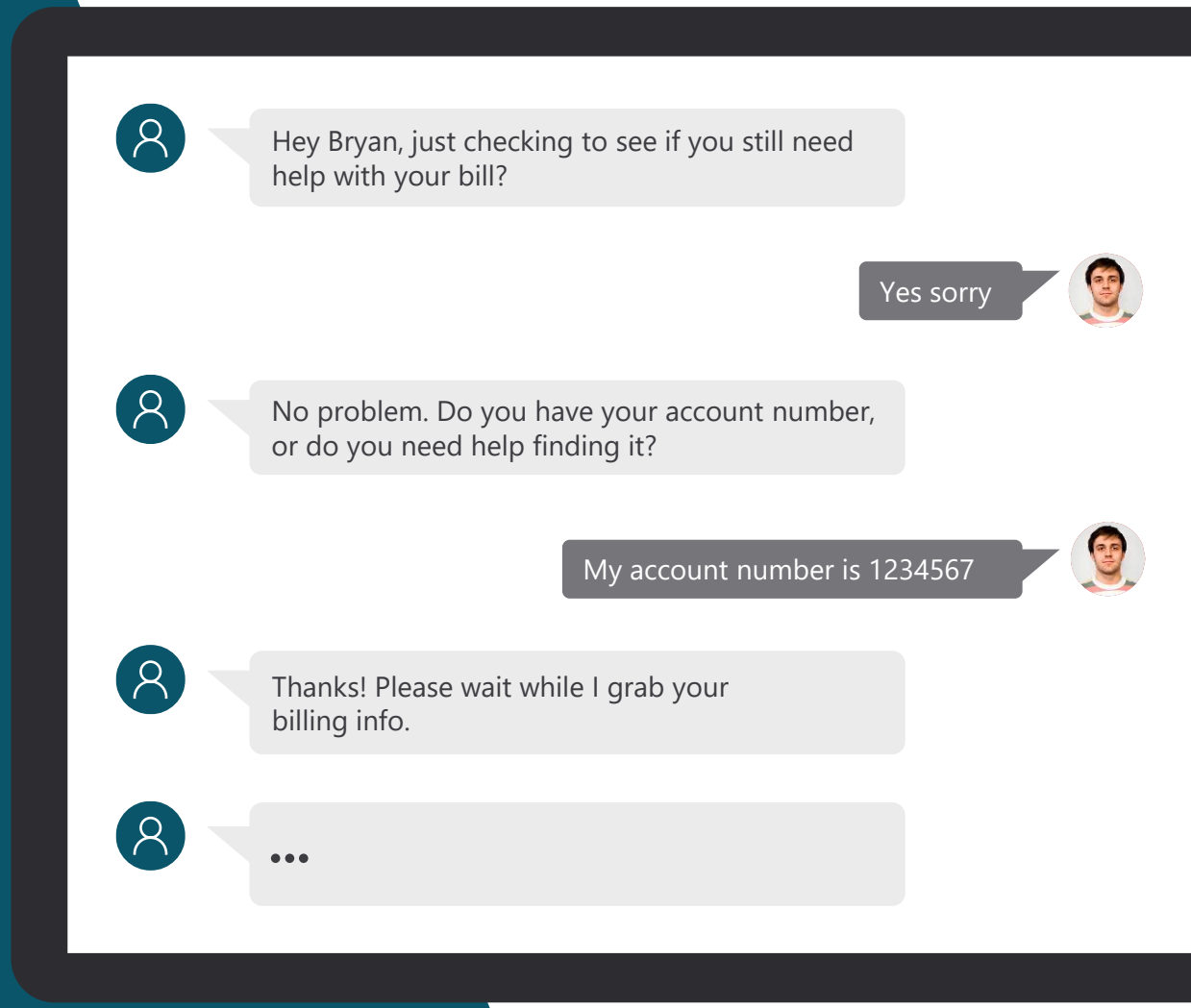


Style: How to sound conversational 8/9

Invite the user into the conversation on a regular basis by asking questions or making suggestions.

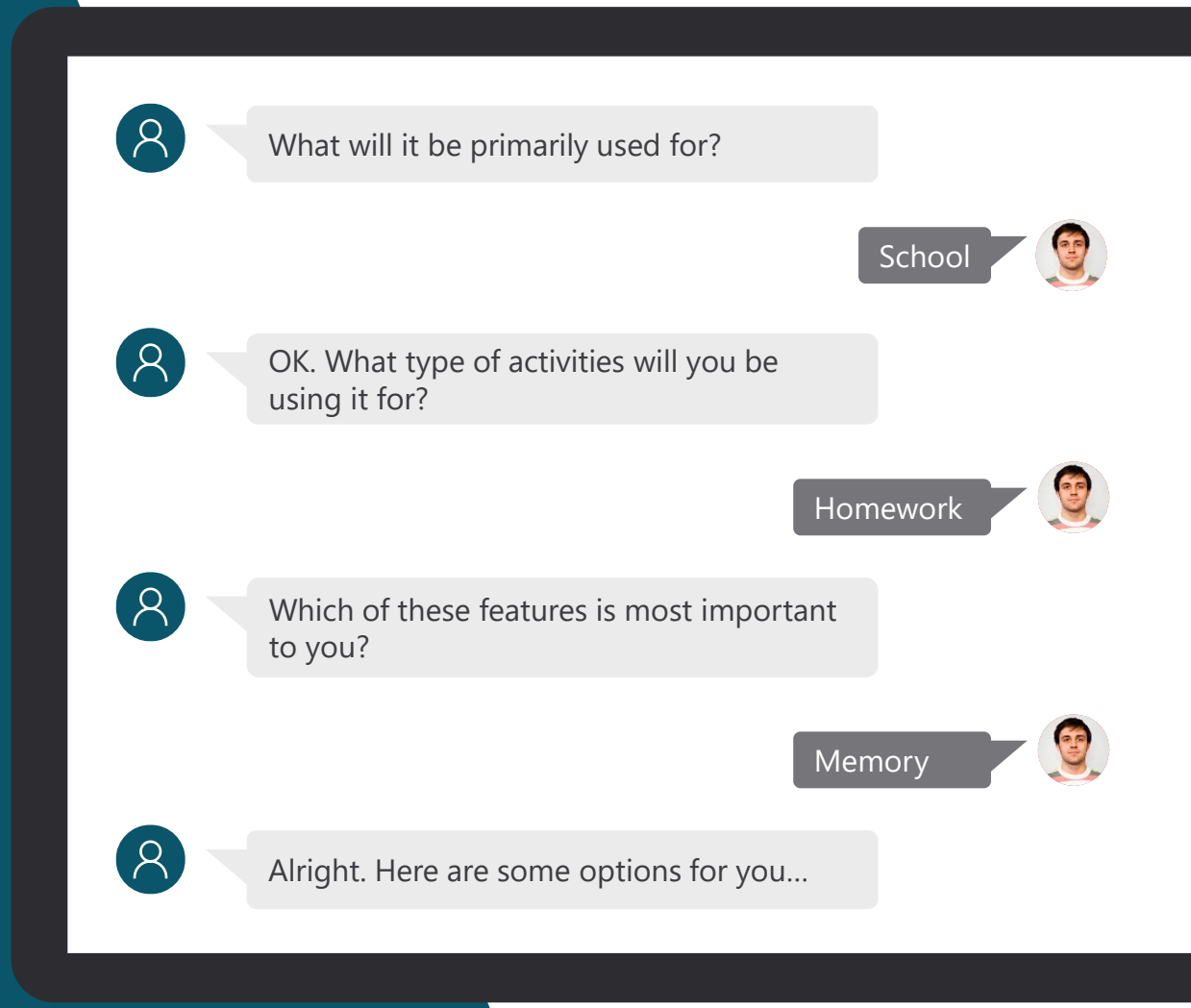
Respond to the customer in a timely manner.

If the copilot may take a while to process the customer's request, let the customer know what to expect.



Style: How to sound conversational 9/9

Customers abandon a chat when the prompts are lengthy, so keep them brief. To keep your writing simple and straightforward, use the Flesch-Kincaid Grade Level feature in Microsoft Word or an app like Hemingwayapp.com to figure out the grade level for your scripts. In general, the lower the grade level, the better.

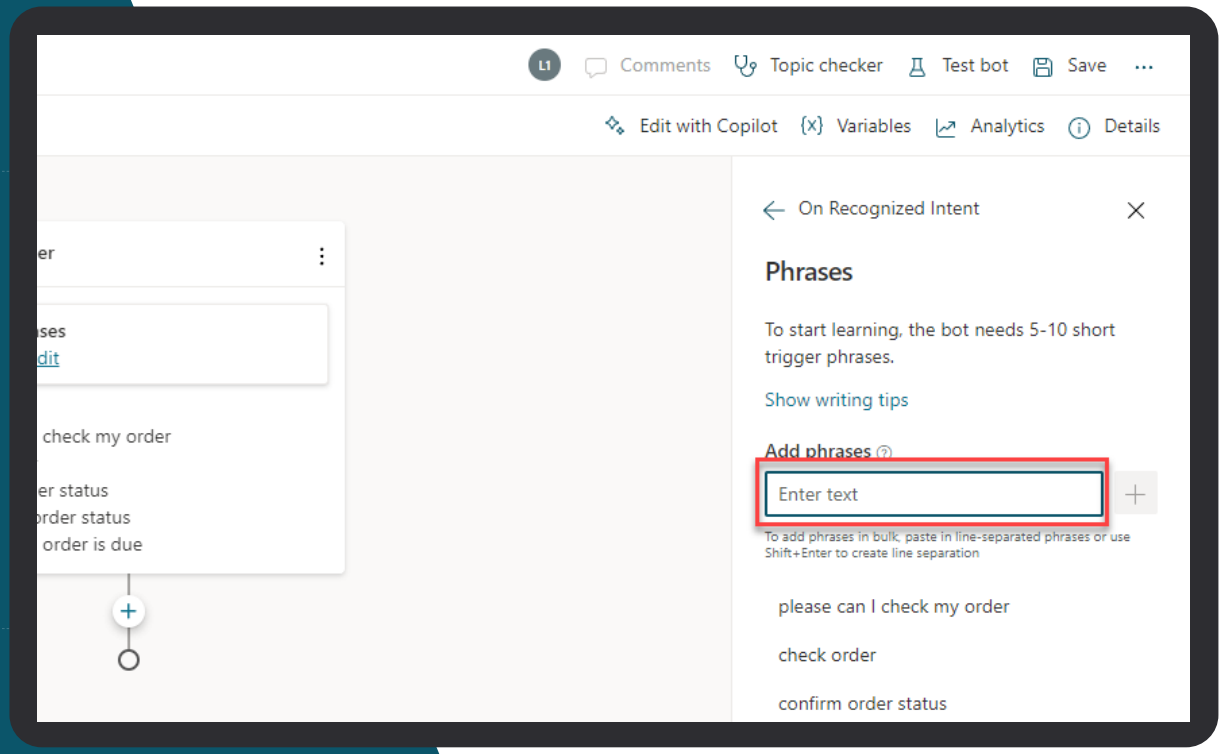


Planning your first copilot - Ideation

Planning your copilot is essential for the success of your project

Setting goals when implementing any business system should be driven from business value

Take your time planning and do not rush

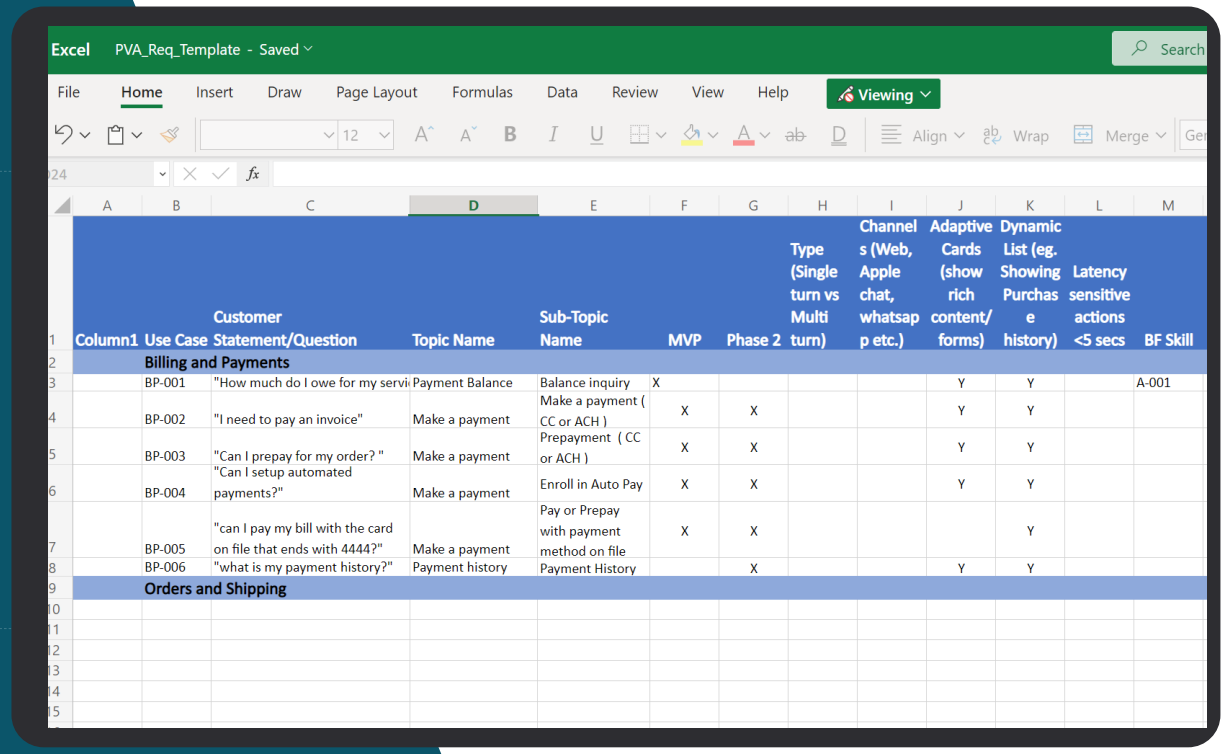


Planning your first copilot – Requirements Gathering

Topic Planning is essential to be able to map the range of topics you want to enable for your users

Use the template provided in the Bot Building Handbook to log key information about the topics

Additional information can be added and developed as you go



Column1	Use Case	Customer Statement/Question	Topic Name	Sub-Topic Name	MVP	Phase 2	Type (Single turn vs Multi turn)	Channels (Web, Apple chat, whatsapp etc.)	Adaptive Cards (show rich content/ forms)	Dynamic List (eg. Showing Purchase history)	Latency sensitive actions <5 secs	BF Skill
Billing and Payments												
	BP-001	"How much do I owe for my servi	Payment Balance	Balance inquiry	X				Y	Y		A-001
	BP-002	"I need to pay an invoice"	Make a payment	Make a payment (CC or ACH)	X	X			Y	Y		
	BP-003	"Can I prepay for my order? "	Make a payment	Prepayment (CC or ACH)	X	X			Y	Y		
	BP-004	"Can I setup automated payments?"	Make a payment	Enroll in Auto Pay	X	X			Y	Y		
	BP-005	"can I pay my bill with the card on file that ends with 4444?"	Make a payment	Pay or Prepay with payment method on file	X	X				Y		
	BP-006	"what is my payment history?"	Payment history	Payment History		X			Y	Y		
Orders and Shipping												

Microsoft Power Platform

Lab 01:

Planning your first copilot

(Lab Time)

Microsoft Power Platform

Lab 02:

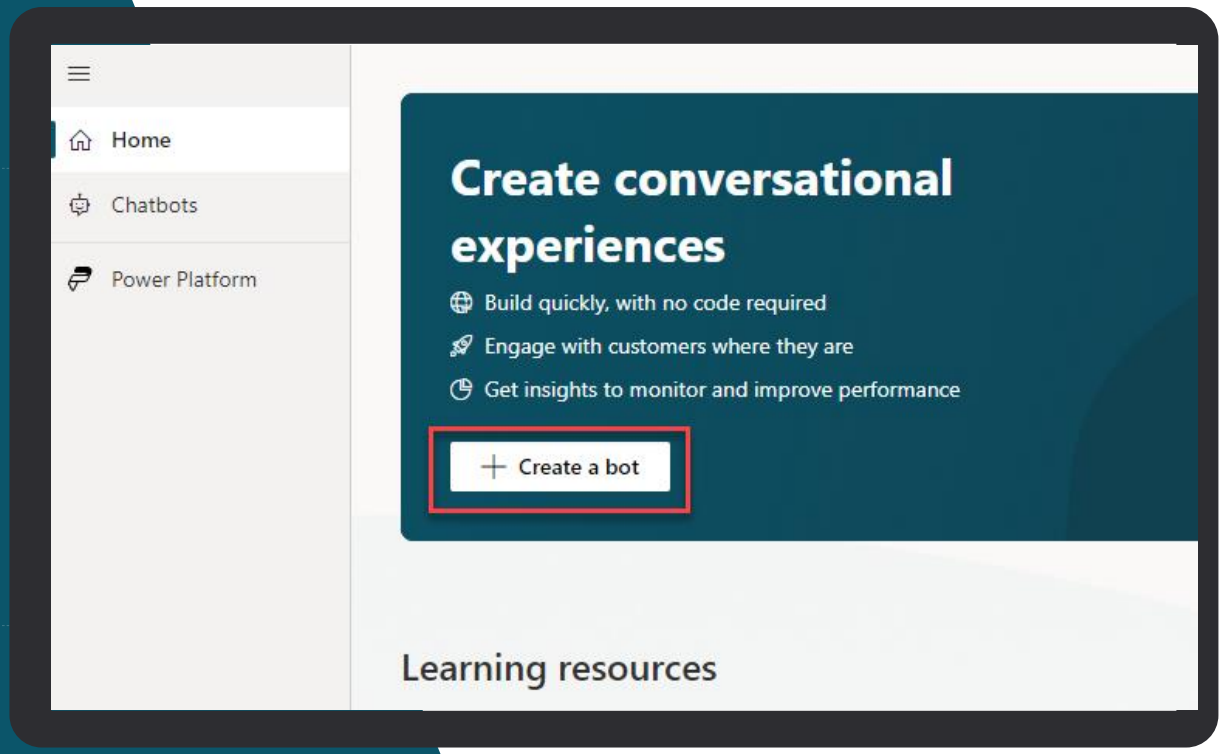
Creating your first copilot

Creating your first copilot

Take the time to familiarize yourself with the User Interface

Don’t try to do everything at once. Lab 01 keeps things simple with creating a topic, testing and publishing

Even if you finish the lab quickly, try repeating the same steps to become familiar with core actions



Power Virtual Agents

Home
Create
Chatbots

Create conversational experiences

- Build quickly, with no code required
- Engage with customers where they are
- Get insights to monitor and improve performance

+ Create a bot

Learning resources

How-to videos | Documentation | Learning paths

Lifecycle of a Bot in Power Virtual Agents

YouTube

The evolution of Power Virtual Agents

YouTube

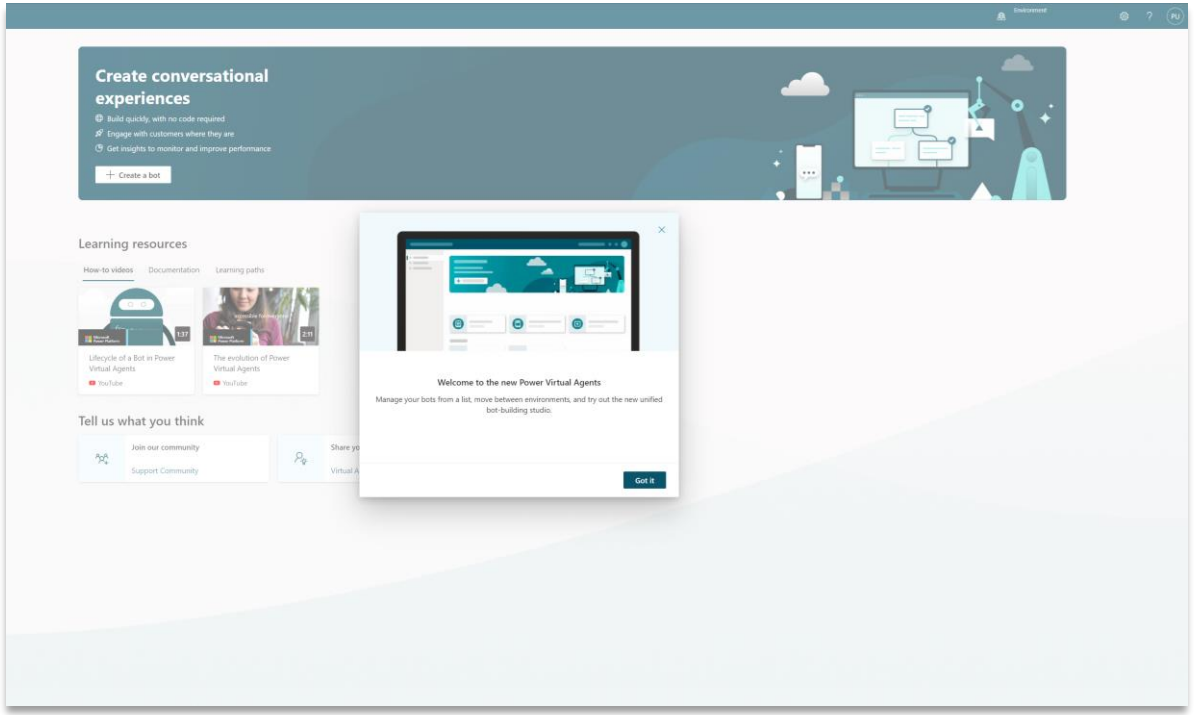
Tell us what you think

Join our community
Support Community

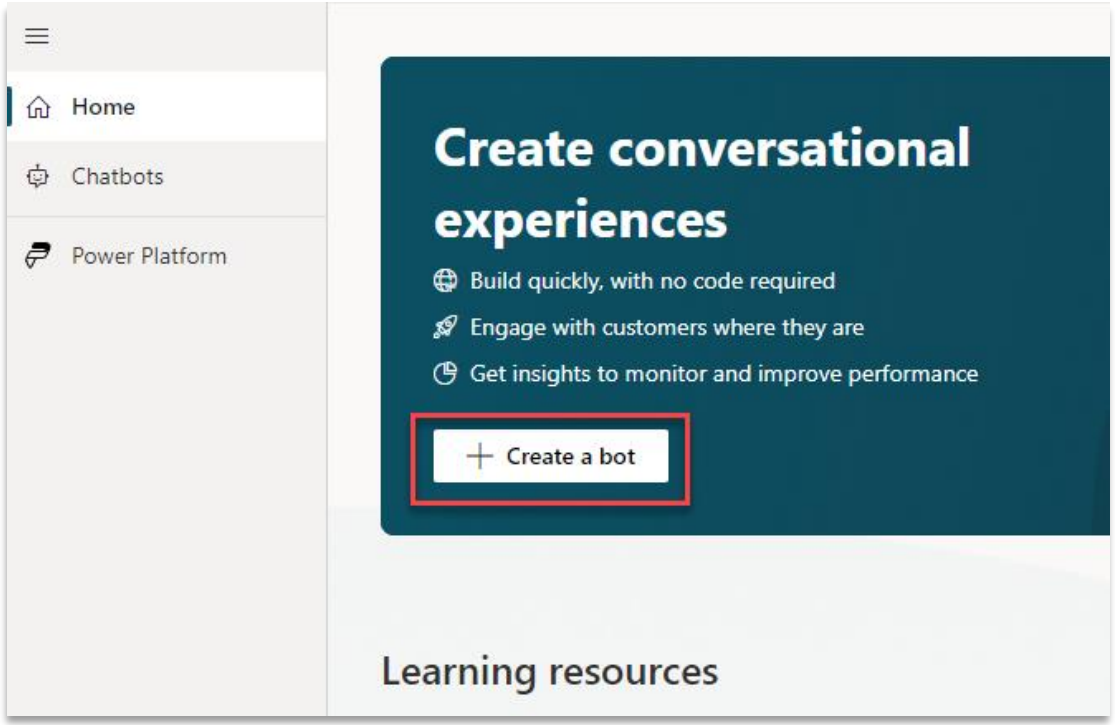
Share your thoughts and ideas
Virtual Agent Idea Forum

Get hands-on with bot building
Power Virtual Agents in a Day

The ‘Home’ page



A welcome dialog highlighting the latest version of Copilot Studio



Click ‘Create a copilot’ and you should be able to start the copilot creation wizard

© Microsoft Corporation

User 1 Contoso Customer Service

View Solution (Default Solution) ⓘ

A

B

C

D

E

F

Test bot

Track between topics

Chat

Hello, I'm User 1 Contoso Customer Service. How can I help?

5 minutes ago

User 1 Contoso Customer Service

View Solution (Default Solution)

Create generative answers (preview)

Boost your conversations in real time based on selected content to answer unanticipated questions. Learn more

Get started in AI Capabilities

Edit and test your bot

Customize topics to fit your b
bot to see the conversation ir

Test bot

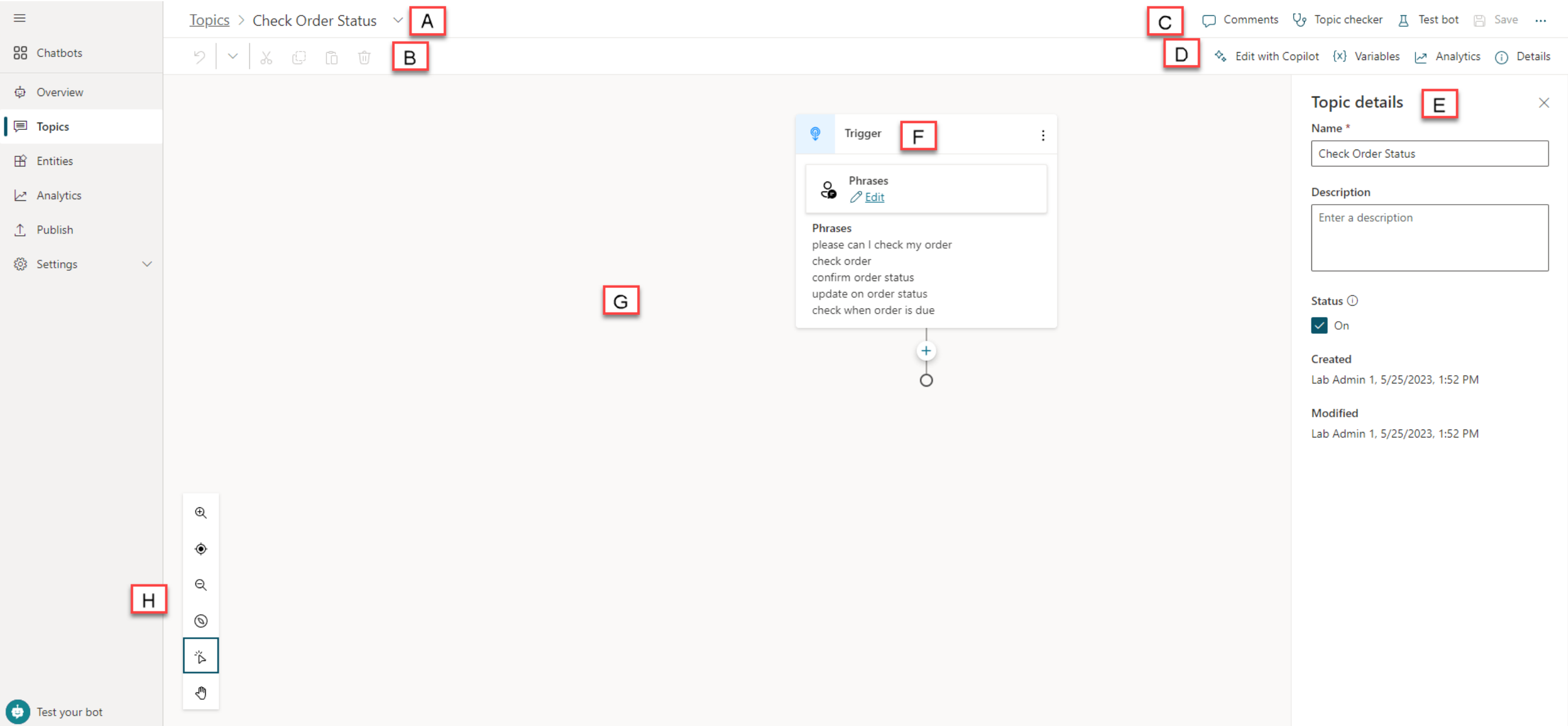
Learn more

Power Virtual Agents documentation

Product videos

Building bots better together

Tell us what you think

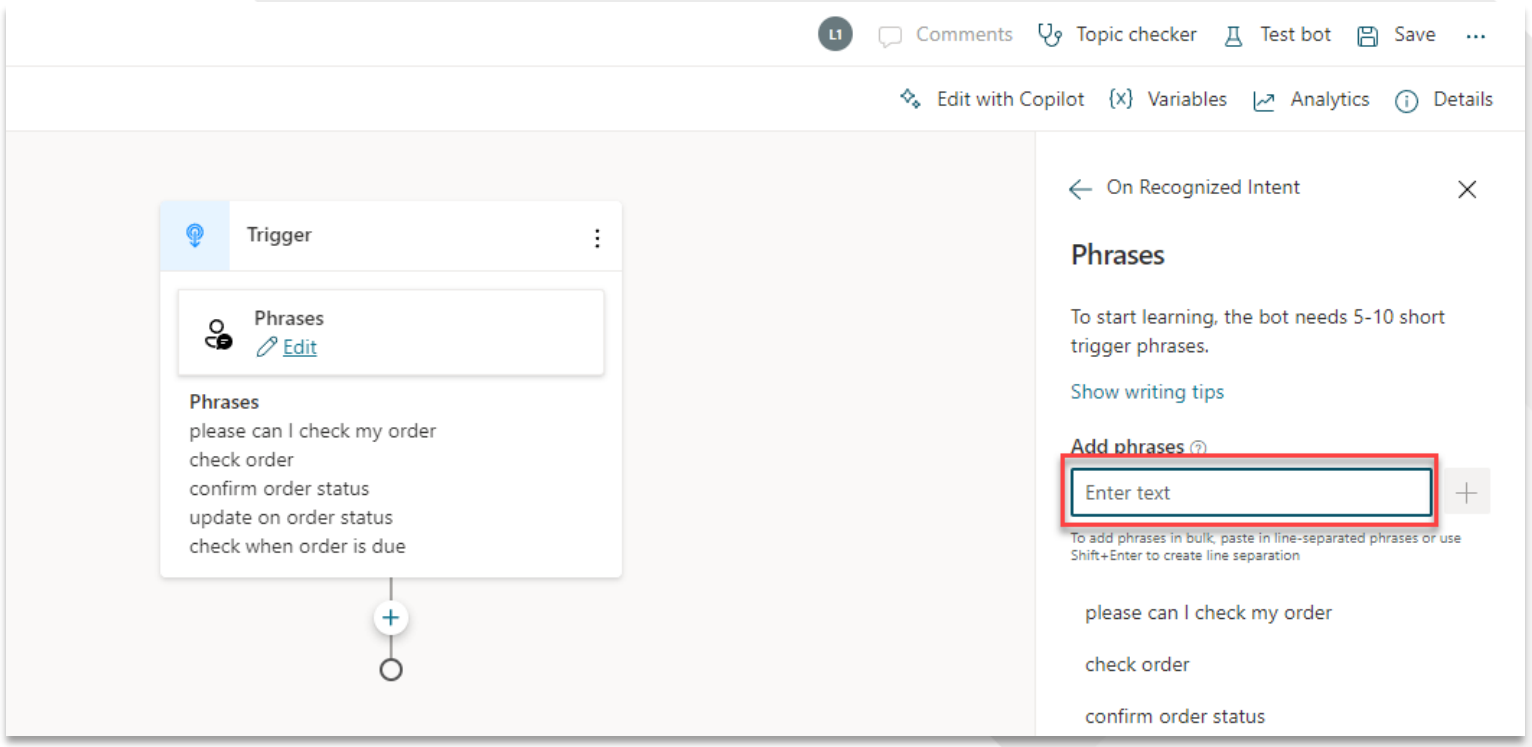

Topics
Check Order Status
A
B
C
D
Comments
Topic checker
Test bot
Save
Edit with Copilot
Variables
Analytics
Details
Chatbots
Overview
Topics
Entities
Analytics
Publish
Settings
Test your bot
Trigger
F
Phrases
Edit
Phrases
please can I check my order
check order
confirm order status
update on order status
check when order is due
G
H
Topic details
E
Name *
Check Order Status
Description
Enter a description
Status
On
Created
Lab Admin 1, 5/25/2023, 1:52 PM
Modified
Lab Admin 1, 5/25/2023, 1:52 PM
Microsoft Power Virtual Agents

Microsoft Power Platform

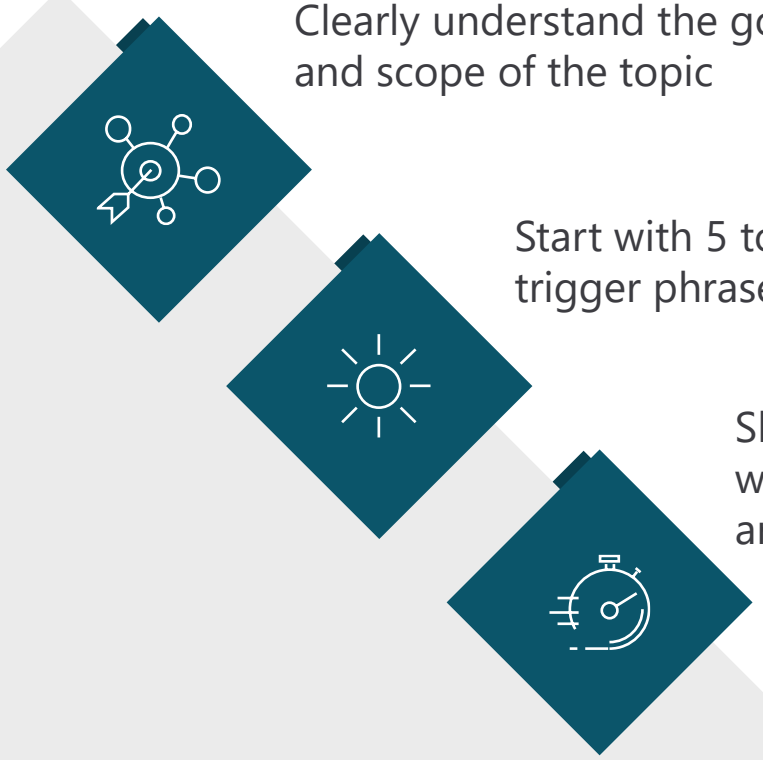
Best practices for writing topic trigger phrases

Trigger phrases – Definition

Trigger the copilot to begin a conversation about a specific topic



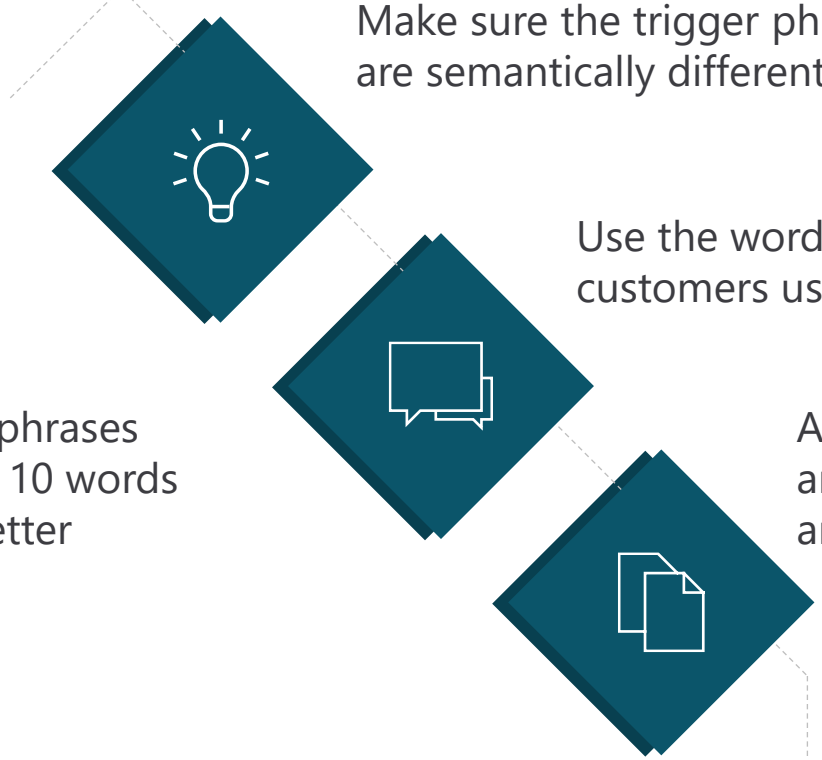
Guidelines for better trigger phrase design



Clearly understand the goal and scope of the topic

Start with 5 to 10 trigger phrases

Shorter trigger phrases with fewer than 10 words are generally better

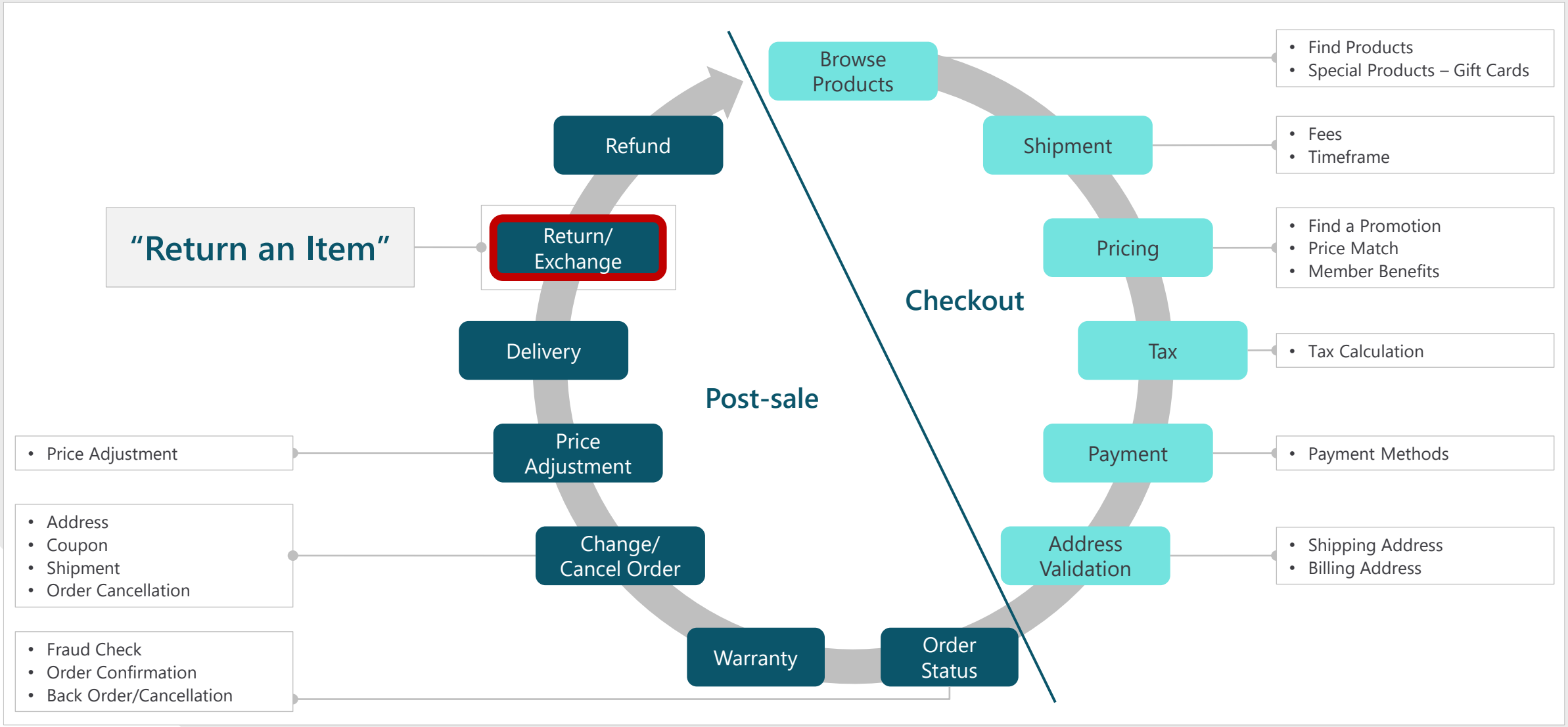


Make sure the trigger phrases are semantically different

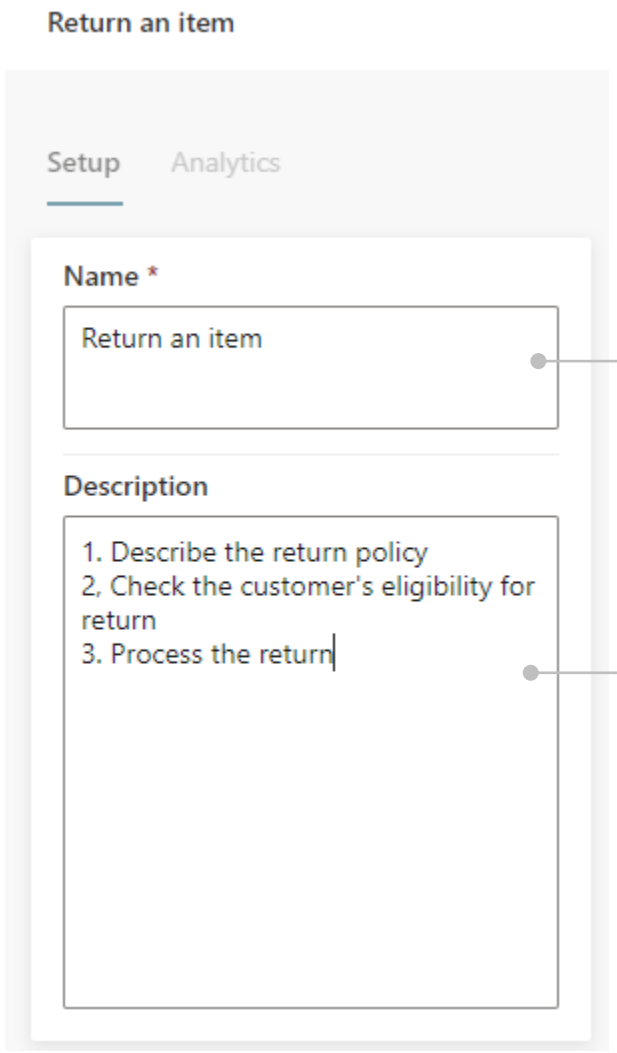
Use the words your customers use!

Avoid trigger phrases that are highly ambiguous among different topics

Step 1: Pick a topic



Step 2: Define the goal for the topic

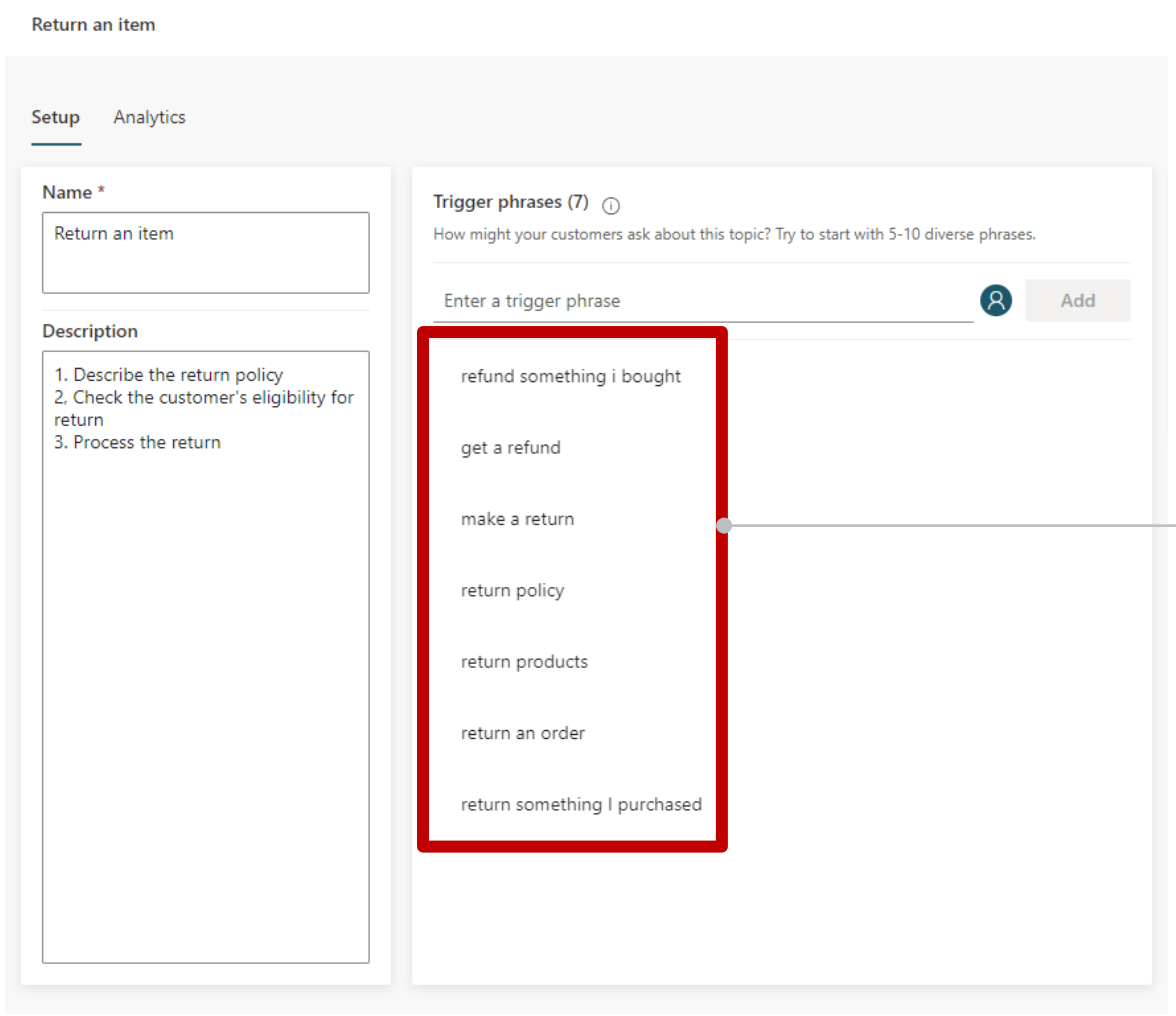


Topic: **"Return an item"**

Goal:

1. Describe return policy of the store
2. Check customer’s eligibility for return
3. Process the return

Step 3: Create trigger phrases



Steps:

- Start with 5 to 10 trigger phrases. You may need more trigger phrases if the scope of the topic is large
- Shorter trigger phrases with less than 10 words are generally better

Step 4: Review trigger phrases 1/3

Refund something I bought

Get a refund

Make a return

Return policy

Return products

Return an order

Return something I purchased

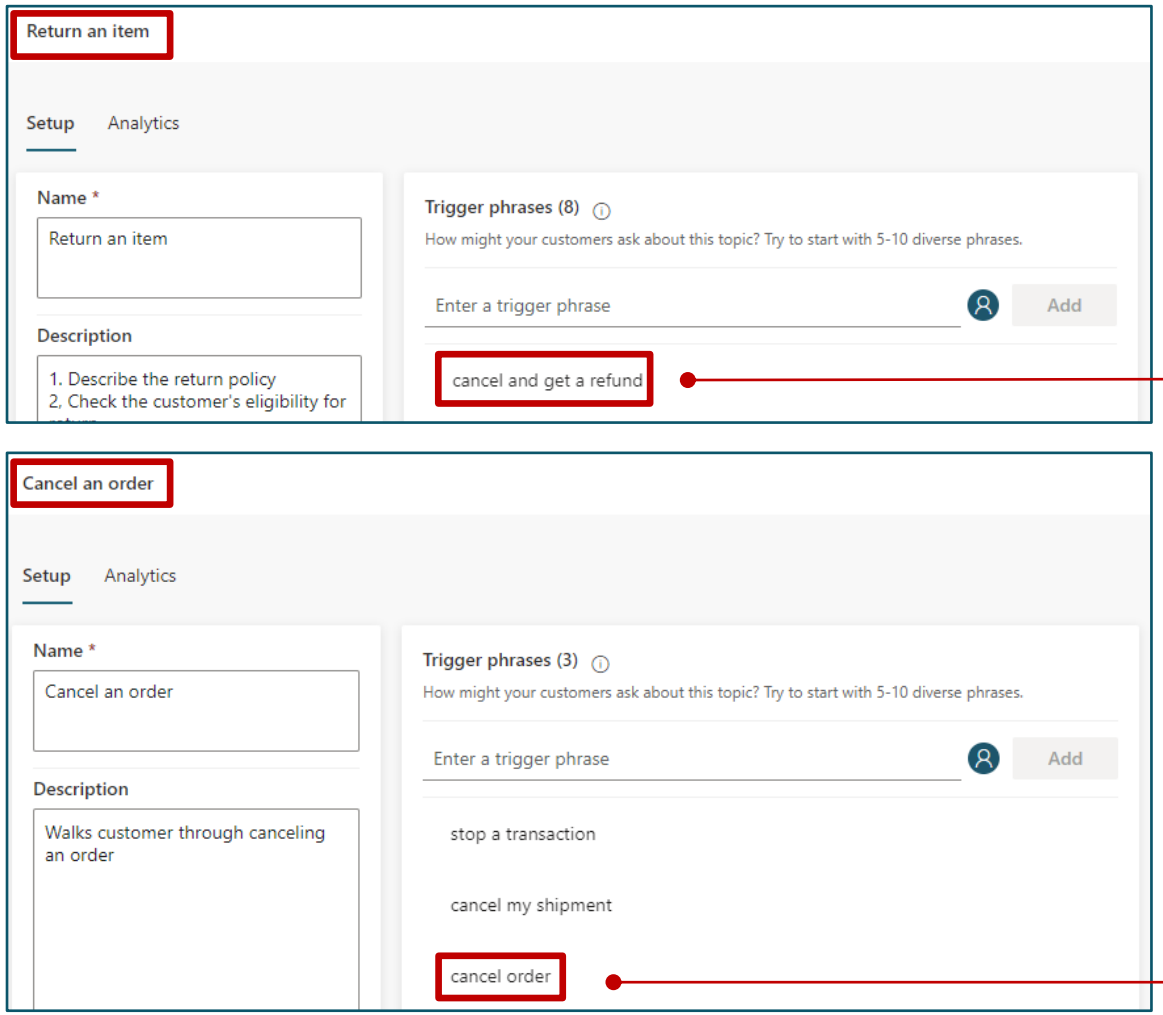
Steps:

- Make sure the trigger phrases are semantically different; using one different noun or verb could be enough to expand a topic's coverage

Step 4: Review trigger phrases 2/3

- Adding articles (an, the, etc.), capitalization, contractions, and pluralization has a low chance of improving the triggering

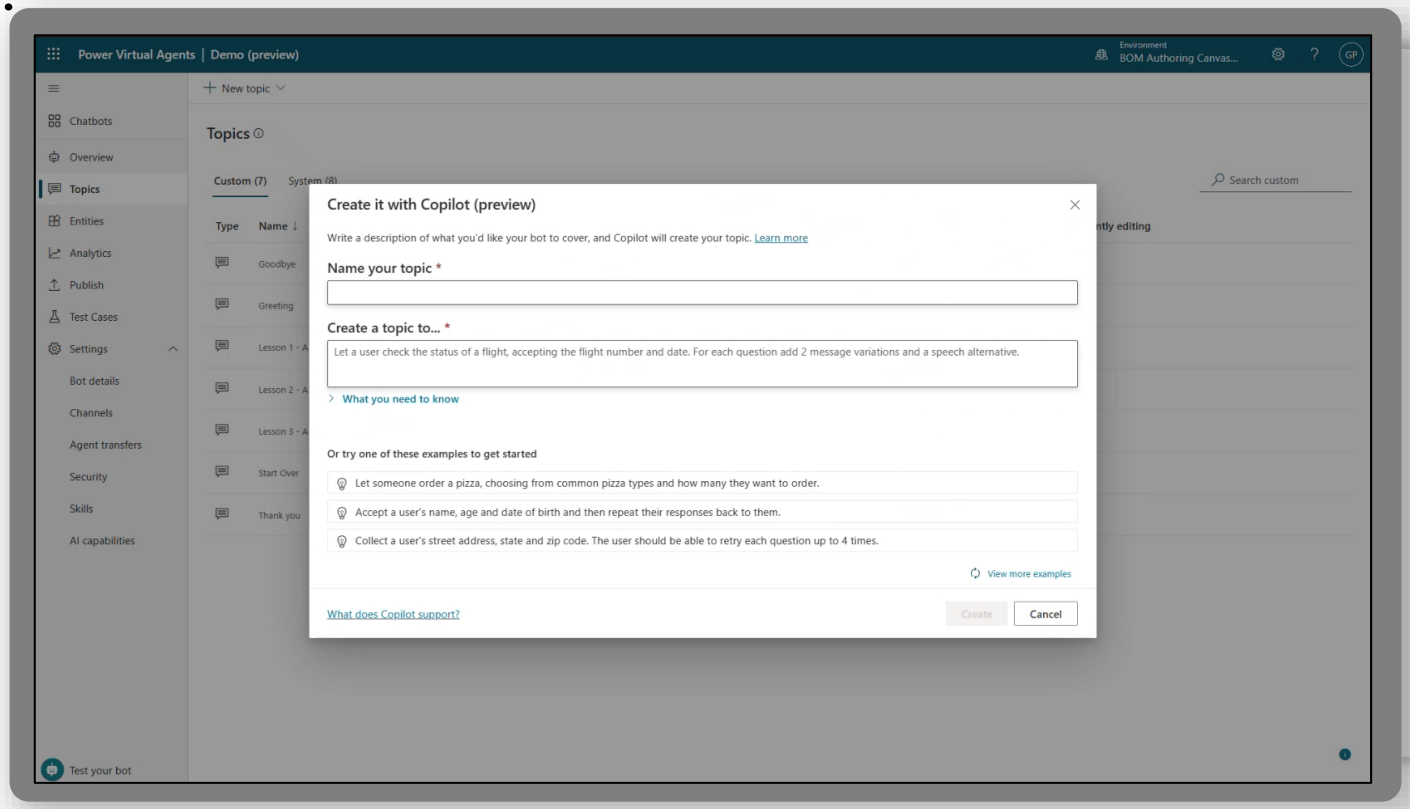
Step 4: Review trigger phrases 3/3



- Avoid overlapping trigger phrases or ambiguous trigger phrases among different topics

Generative AI

AI assistance in building topics, designing and modifying the copilot all through natural language.



Assisted authoring for:

- Topic creation
- Topic iteration
- Response generation
- Adaptive Card generation
- Topic improvement suggestions
- Suggested trigger phrases, topic names, topic descriptions
- Transcript generation
- Copilot creation
- Topic suggestions

Azure copilots take months to author.

Copilots took days to author.

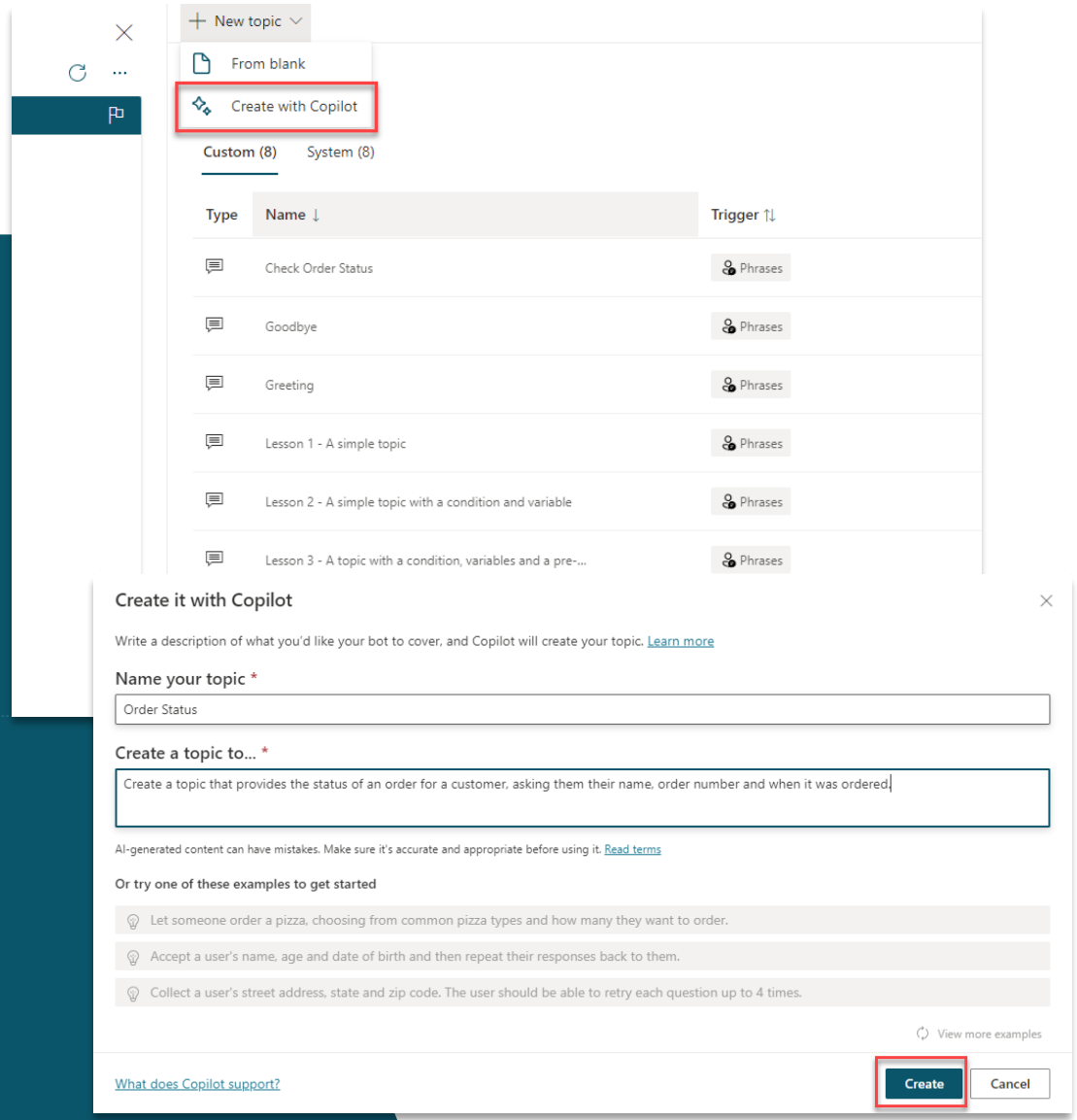
Prompt-authored solutions will take hours, or even minutes to author.

Classified as Microsoft Confidential

Creating a Topic with Co-Pilot

Create topics using Natural Language to describe what you need the topic to do

Reduce manual steps of creation and iterate using Co-Pilot too!



Microsoft Power Platform

Lab 02:

Creating your first copilot

(Lab Time)

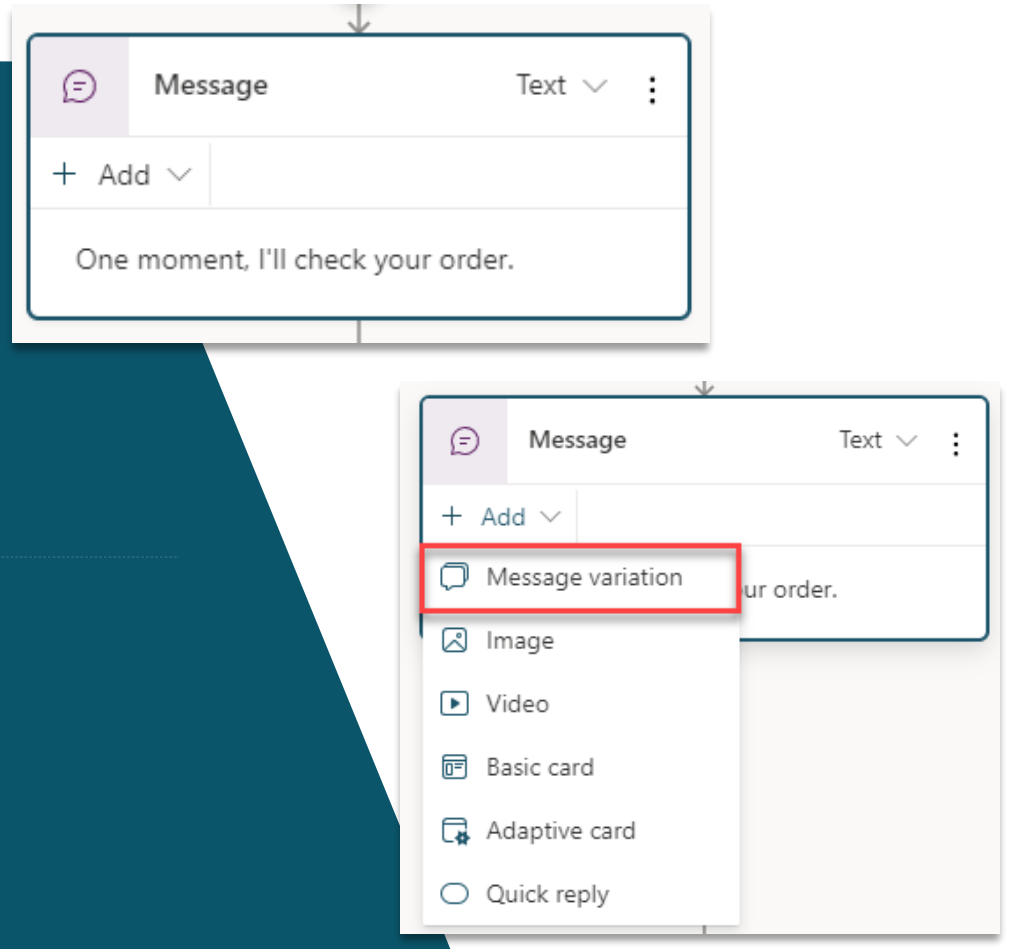
Microsoft Power Platform

Authoring 101 in the Unified Authoring Canvas

The Message Node

The Message Node is one of the most common nodes used when authoring copilots

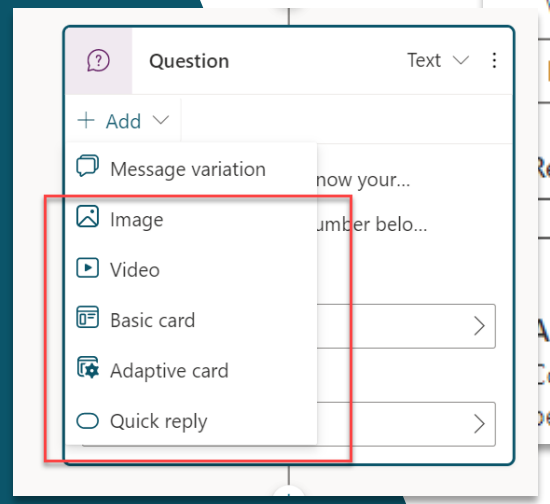
It allows you to display standard text, formatted text and dynamic data in the conversation

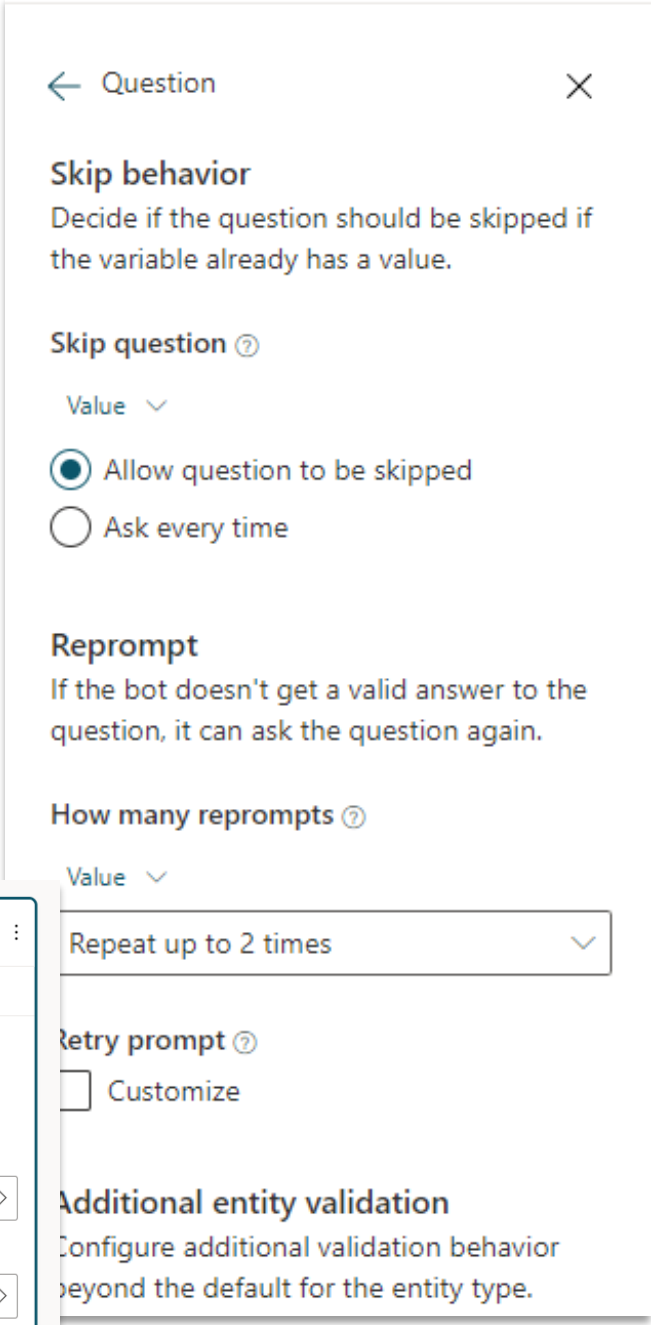


The Question Node

The Question Node is another of the most common nodes used when authoring copilots

It provides capability to ask the user a question and store the data to be used and operated upon

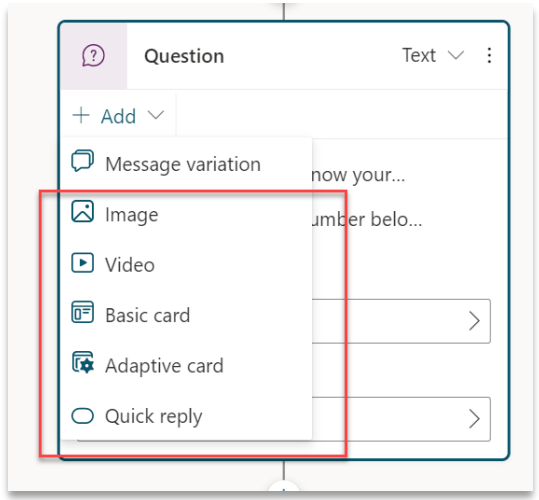


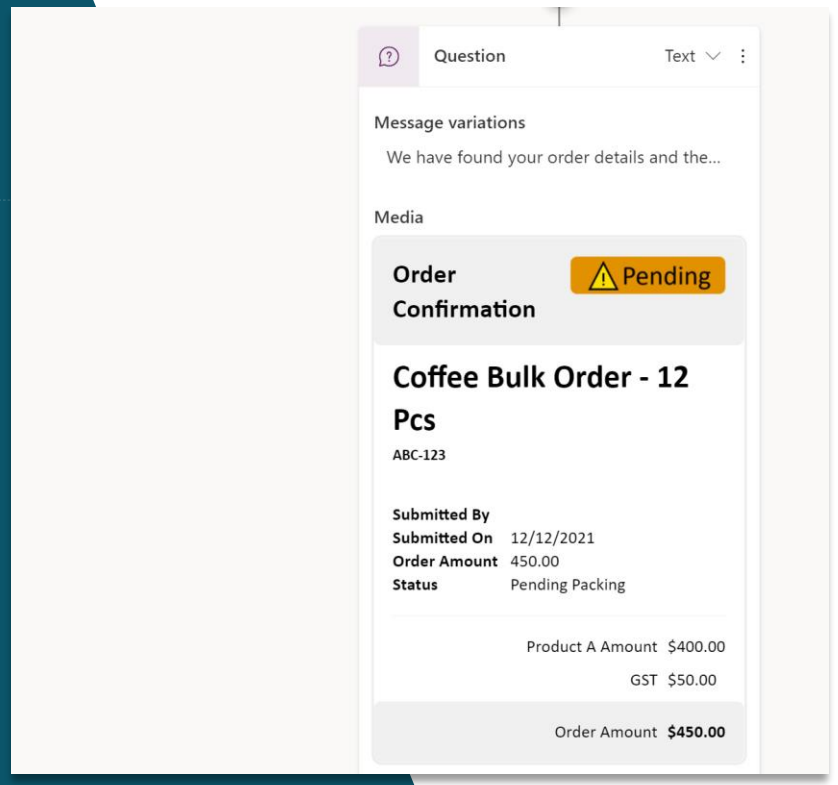


Rich Text Responses

Brand new rich text response options including image and adaptive card

Deliver enhanced experiences to customers and users which are more engaging and display data in more dynamic ways

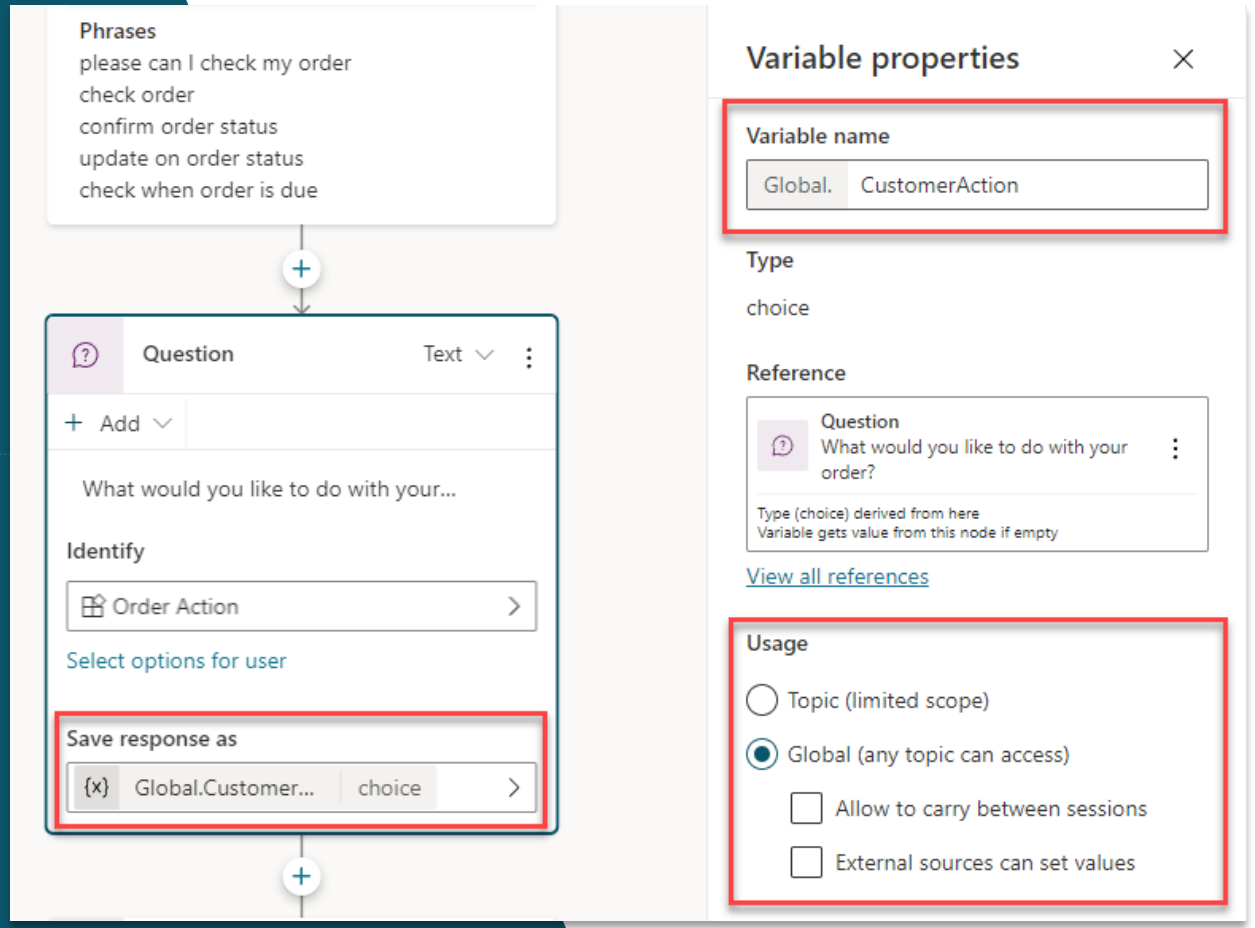




Use variables to navigate customers to tailored content

Direct your customers to content you want them to see

Add variables to keep customer information for later in the conversation

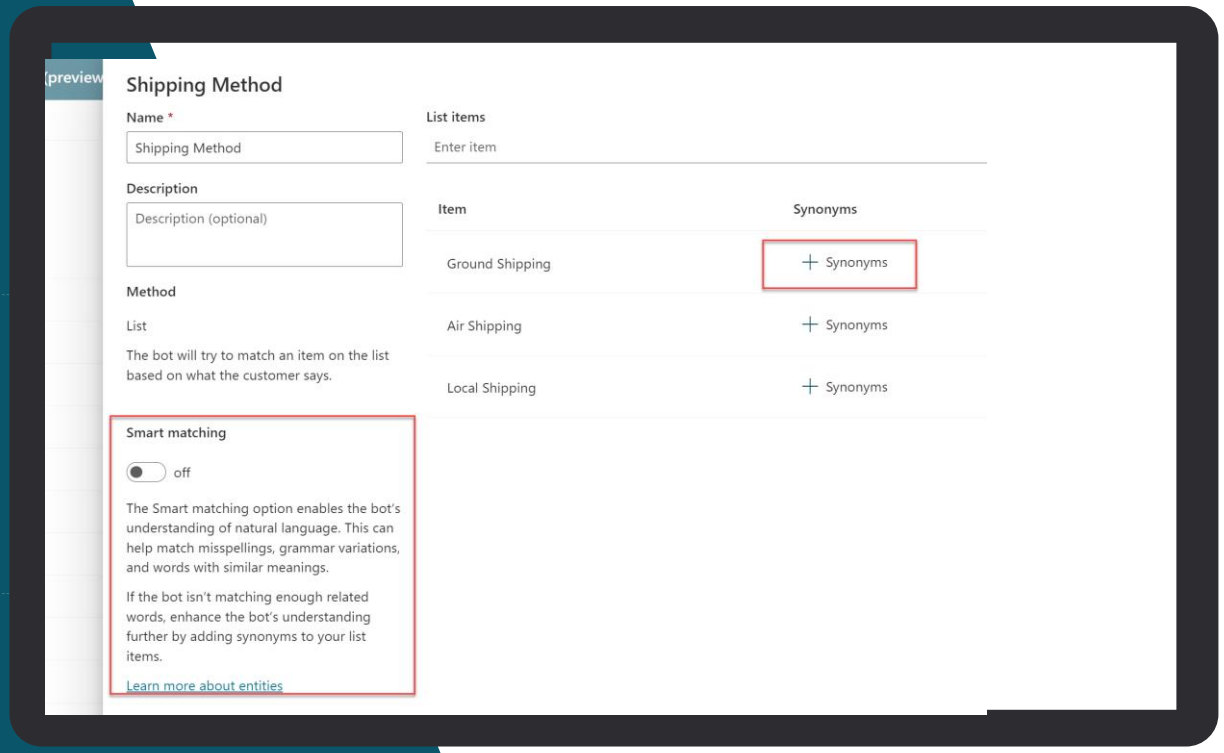


Entities and Slot-filling capabilities

Copilots can intelligently avoid repetitive conversations

Enhances your efficiency as a maker

Copilots can guide you to making the best experience

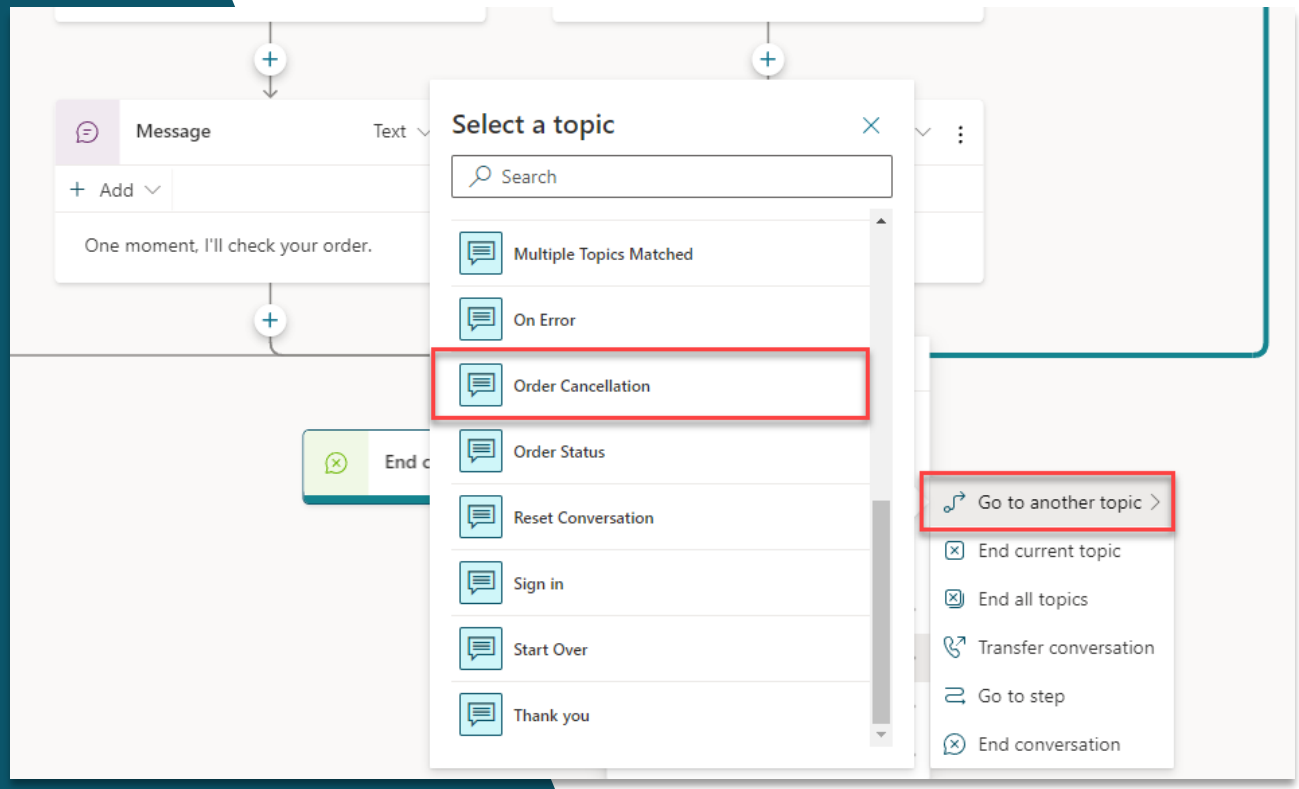


Topic Management

Re-direct and connect customers to related topics

Use it when:

A conversation requires more than one topic, such as when you need to ask a clarifying question to determine which topic the user needs

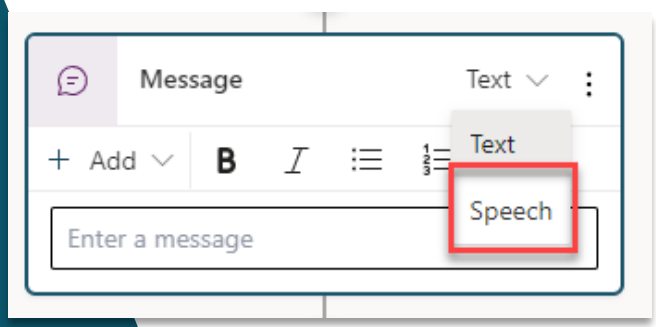


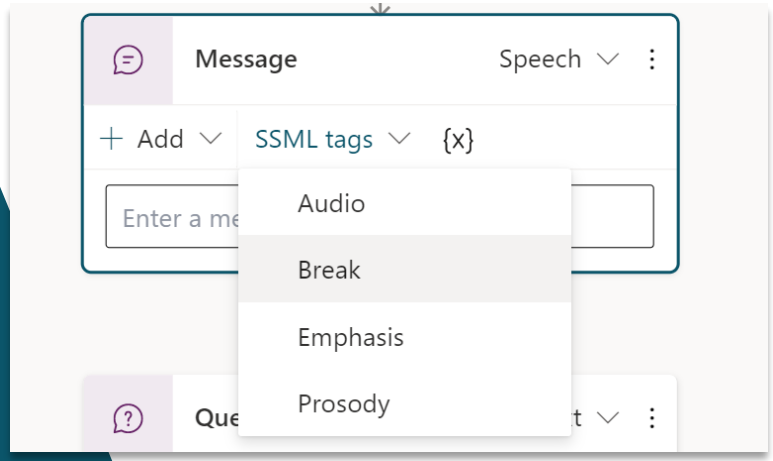
Use enhanced speech authoring capabilities

Directly add SSML overrides

Enhances speech enabled text copilots

Tailor the best experience for your customers





Productivity and Pro Code Options

Author copilots faster with productivity options including copy and paste

Use the code view to quickly code message content

Modify anywhere dialog flow without disruption

Microsoft Power Platform

Lab 03:

Authoring 101 in the Unified Canvas

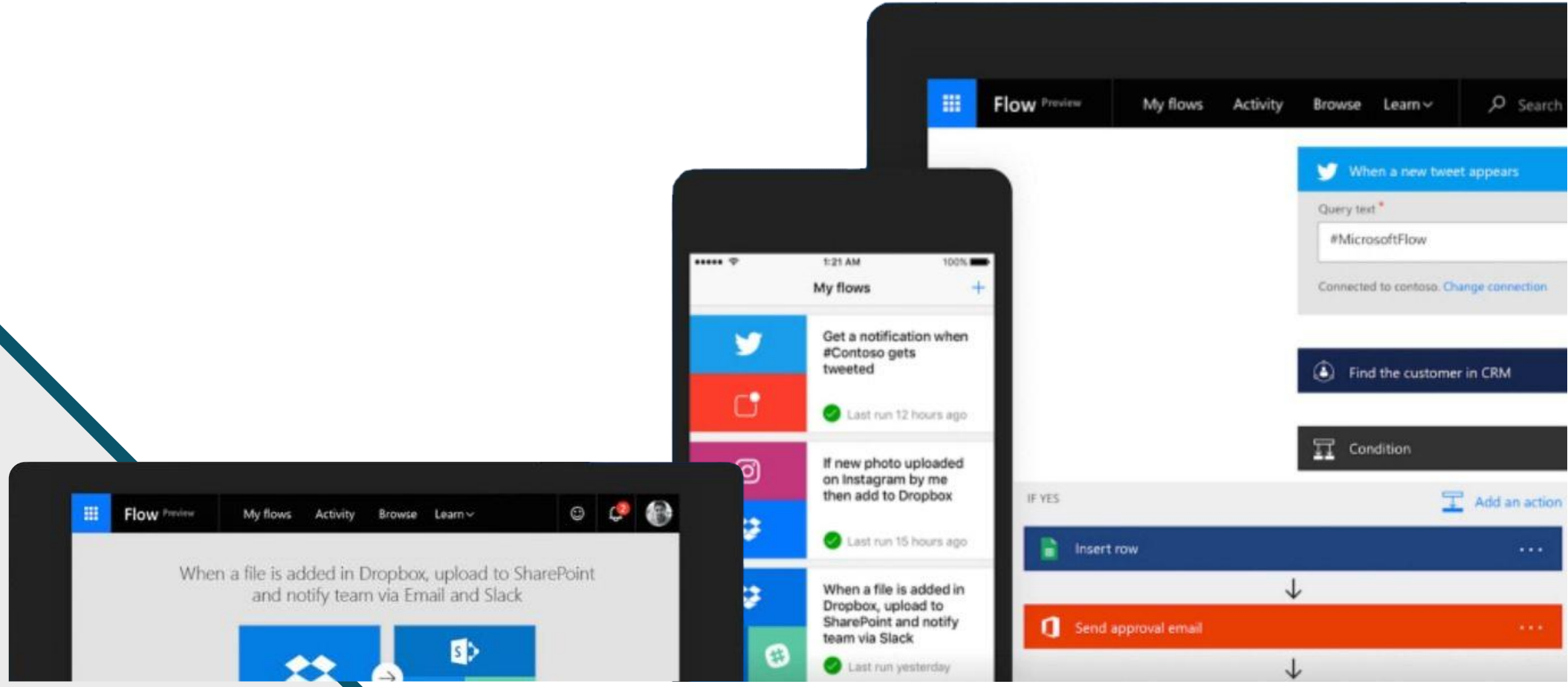
(Lab Time)

Microsoft Power Platform

Copilot Studio + Power Automate

Microsoft Power Automate

is an online workflow service that **automates actions** across apps and services



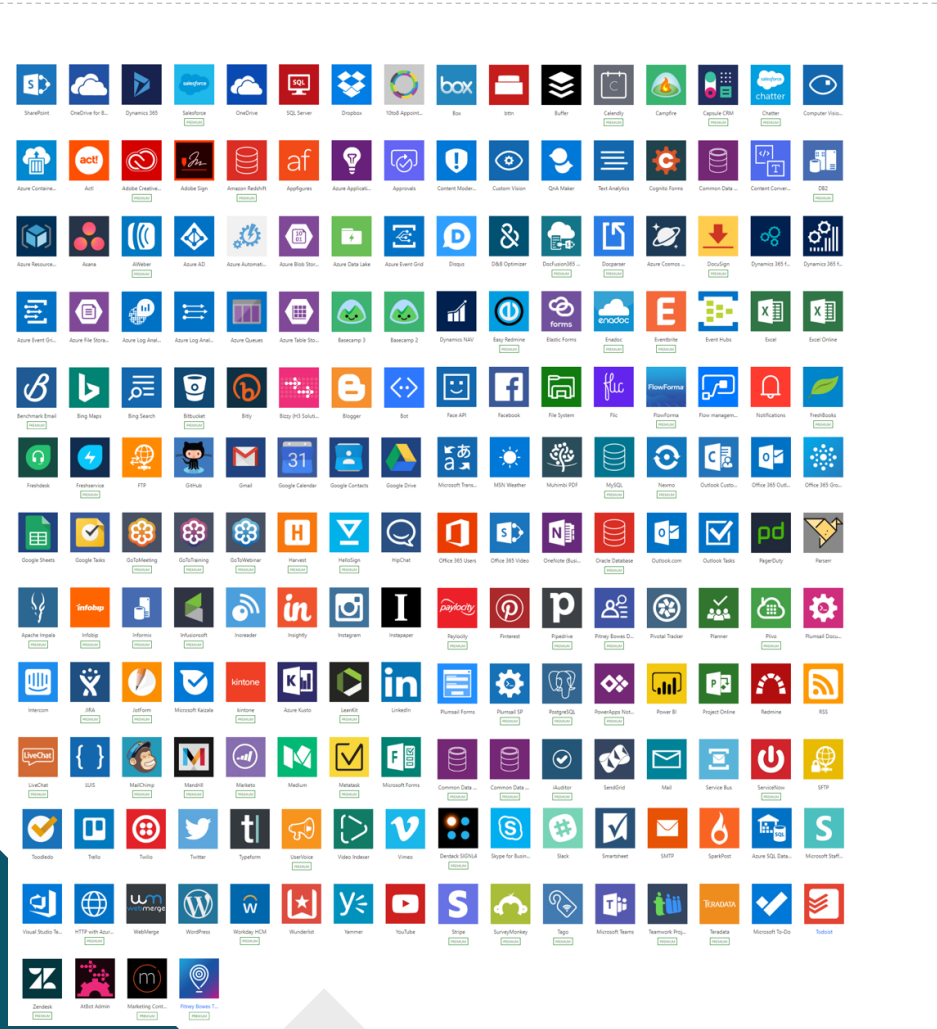
Connectivity & integration

Built-in connectivity to

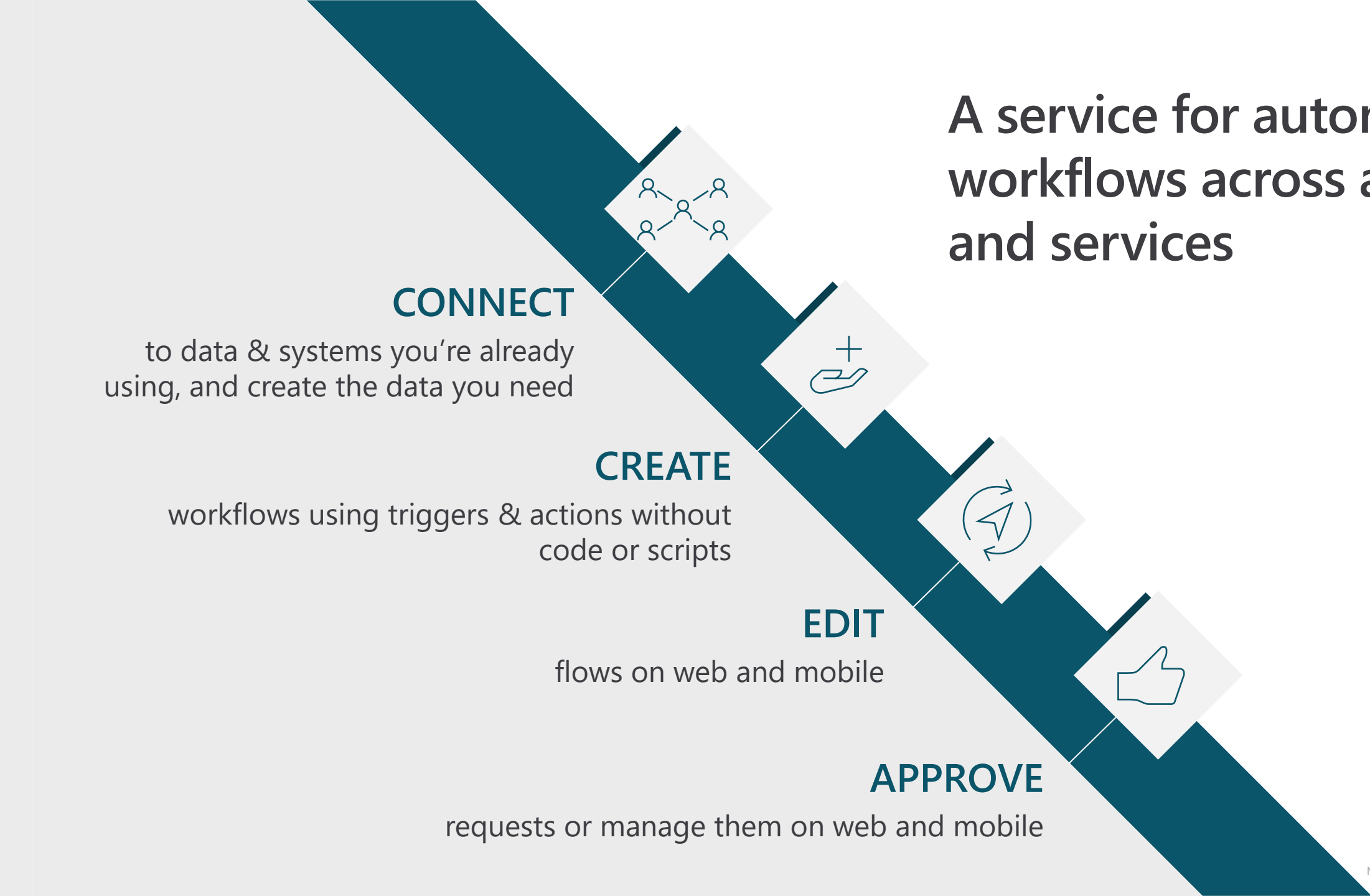
- 1000+ SaaS cloud services
- File providers
- Databases
- Web APIs
- Productivity apps, etc.

Connect to on-premises systems via Data Gateway

Pluggable extensibility via Custom Connectors to integrate existing LOB systems into Power Automate



A service for automating workflows across apps and services



CONNECT

to data & systems you're already using, and create the data you need

CREATE

workflows using triggers & actions without code or scripts

EDIT

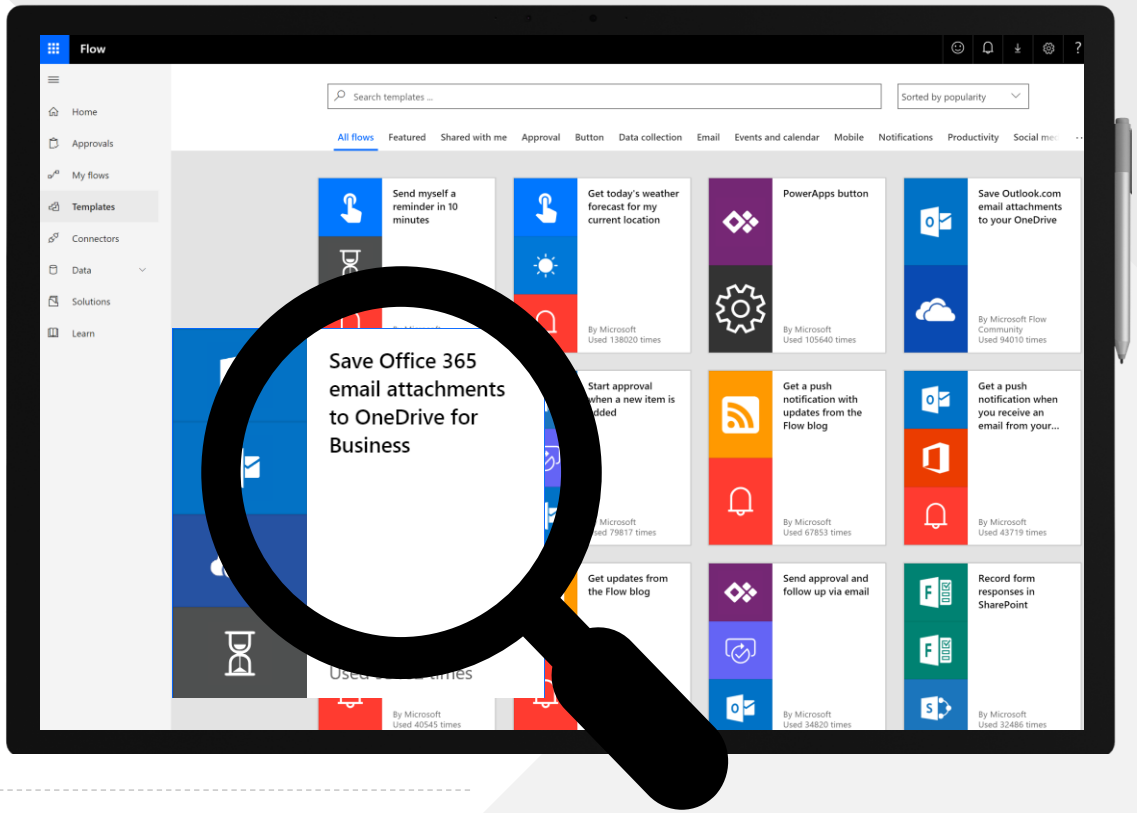
flows on web and mobile

APPROVE

requests or manage them on web and mobile

Get started with a growing library of templates

Jumpstart flows using over 100+ templates for common scenarios
Connect services you're already using in more meaningful ways



Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications

Innovation anywhere. Unlocks value everywhere.

Power BI
Business analytics

Power Apps
Application development

- Canvas Apps
- Model-driven Apps

Power Pages
Secure business websites

Power Automate
Process automation

- Cloud Flows & Teams Flows
- Business Process Flows
- Desktop Flows

Copilot Studio
Intelligent Copilots

Data connectors

AI Builder

Dataverse

Unlock your imagination with Power Automate + Copilot Studio

Copilot Studio uses location-based services (LBS) to provide personalized services

2-factor authentications to increase security

Proactively recommends new promotions, benefits, and better rates to your customers

Check user eligibility and submit applications on their behalf

Remote diagnosis for IOT devices

Make appointments for your customers

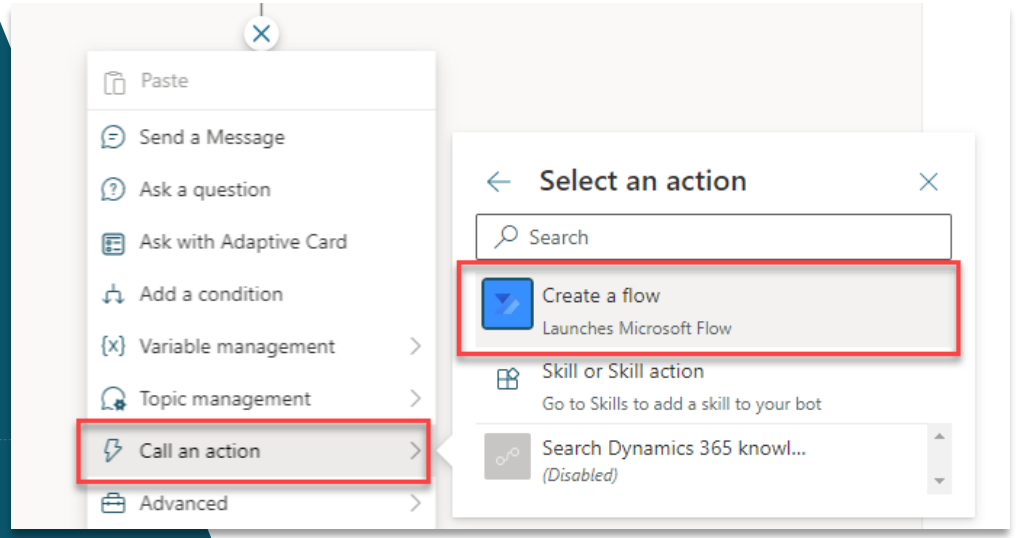
Get a picture of the receipt from employee and use Azure AI for expense reimbursement (integration with Azure AI)

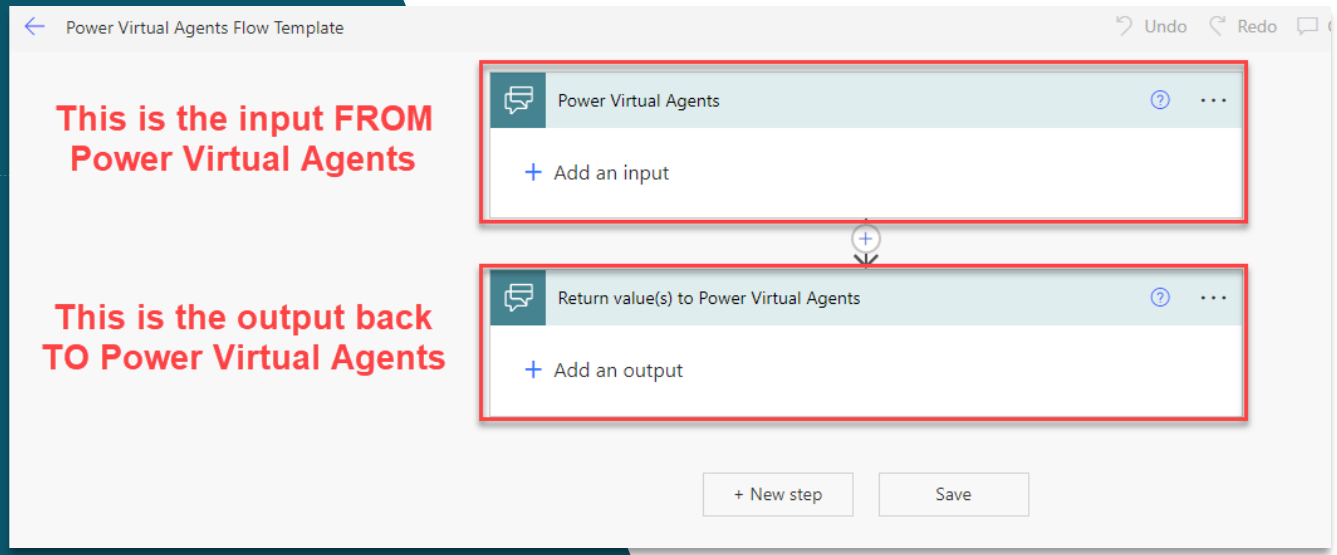
Create a Flow from Copilot Studio

Directly within the Copilot Studio canvas, click ‘Create a flow’

Power Automate opens and creates the input and output to pass data

Add your own custom logic in between to configure it to meet your needs



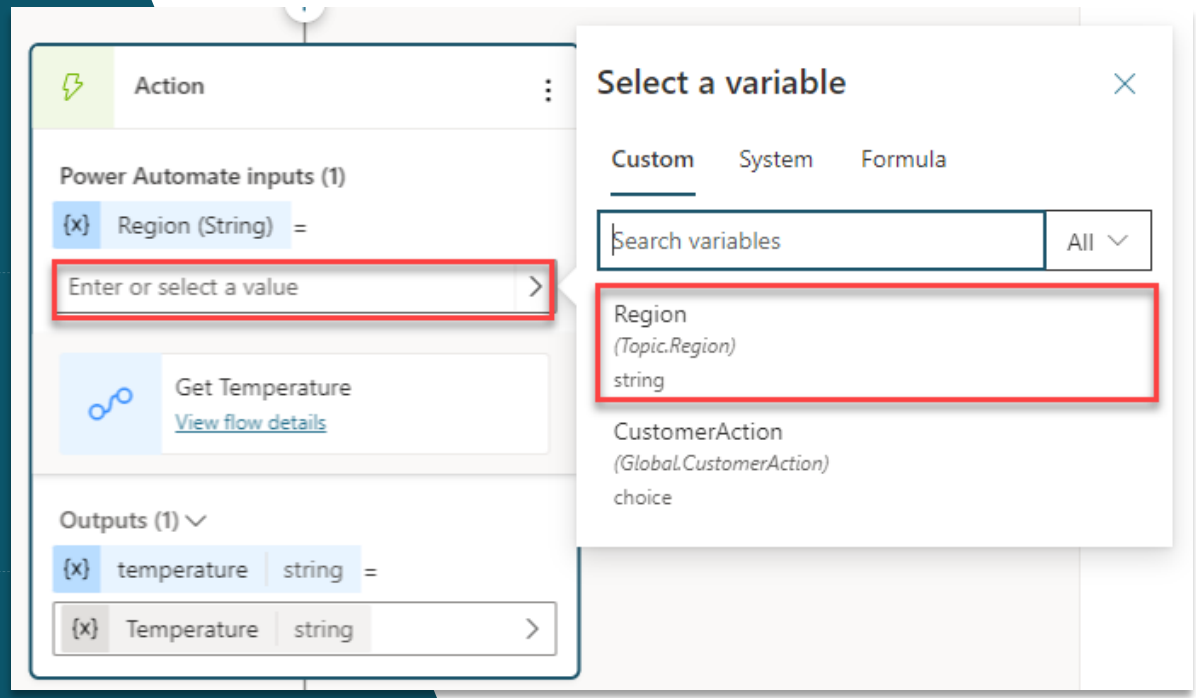


Manage the return of data in Copilot Studio from Power Automate

Specify which variables to send to Power Automate within Copilot Studio

Save data from Power Automate into Copilot Studio variables

Use those variables to perform conditional logic, calculations or display them to the user



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Lab 04:

Build a Power Automate flow

(Lab Time)

Microsoft Power Platform

Closing:
Wrap up and next steps

Learn more about Microsoft Copilot Studio

Visit Copilot Studio to learn more and request a demo

Technical details about the application are available in our help documentation

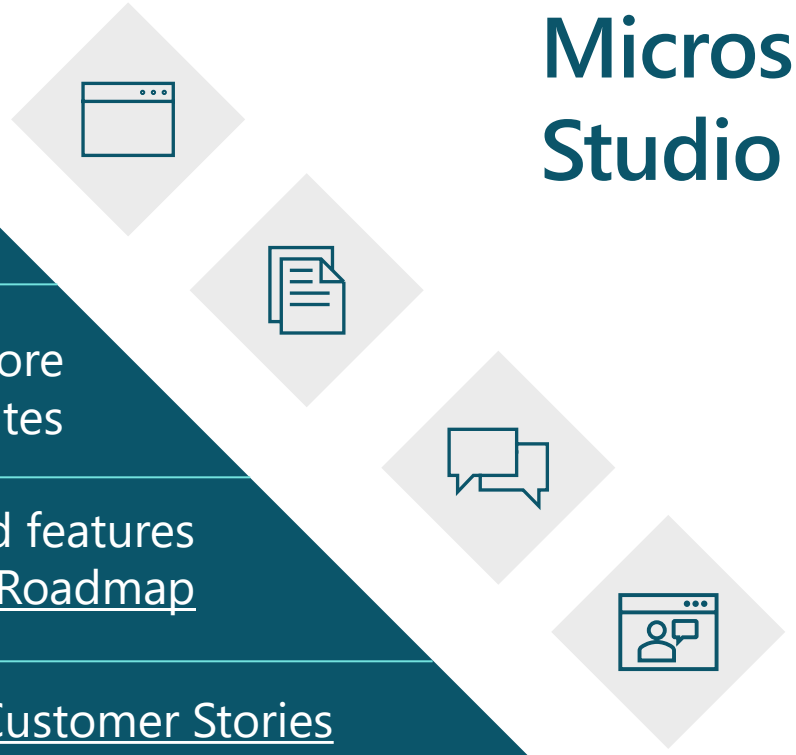
Check Copilot Studio Blog to learn more best practices and updates

View upcoming and planned features on the Roadmap

Explore Customer Stories

For questions please engage in our Community forum

Learn about the Power Platform



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THANK YOU